



# Certified Marina Operator Handbook.

Accreditation

Application

Reaccreditation

## Global Marina Institute

### UK and Europe

British Marine

Training Department,

Tagus House,

9 Ocean Way Southampton

SO14 3TJ,

United Kingdom

Telephone: +44 1784 223630

Email: [training@britishmarine.co.uk](mailto:training@britishmarine.co.uk)

### Australasia

Marina Industries Association

PO Box 724

Crows Nest NSW 1585

Australia

Telephone +61 2 9439 5806

Email: [education@marinas.net.au](mailto:education@marinas.net.au)

## Table Of Contents

<b>Table Of Contents .....</b>	<b>2</b>
<b>Certified Marina Operator Accreditation .....</b>	<b>3</b>
Overview Certified Marina Operator .....	3
Benefits of becoming a CMO .....	4
Higher Earnings .....	4
Preferred Employment Opportunities .....	4
Networking opportunities and CM Meetings .....	4
<b>Certified Marina Operator Application Process .....</b>	<b>4</b>
CMO Application Requirements Checklist .....	4
Appointment of a Mentor .....	5
CMO Application Process Explained .....	6
General Comments .....	6
Application checklist .....	6
Certified Marina Operator Application Payment Policy .....	6
Application form detailed explanation. ....	7
<b>Certified Marina Operator Re-Accreditation .....</b>	<b>14</b>
Overview .....	14
CMO Re-Accreditation Requirements.....	14
Special Circumstances.....	14
CMO's moving to CMM Positions: .....	14
Career Break Guidelines.....	14
CPD Activities and Conditions .....	15
Minimum and maximum hour restrictions .....	15
Recording the CPD hours .....	17
Active CMO's .....	17
Inactive CMO's .....	17
Audit Policy and Process .....	17
<b>Appendix .....</b>	<b>18</b>
Reference/Letter of Recommendation .....	18
Employment Narrative Report Example .....	20

## Certified Marina Operator Accreditation

### Overview Certified Marina Operator

CMOs represent the Industry Leaders in the marina and wider boating industry. They value true personal and professional excellence and strive to maintain the highest levels of ethical and moral conduct in their commitment to the marina industry. CMOs have a deeply rooted respect for the environment and recognize their role in keeping it safe for boaters and the communities that support them. CMOs are marina professionals who have completed an extensive training and certification process and embrace the continuance of education and training for themselves and those who work within the marina industry.

Marina owners, investors and managers see CMOs as being qualified, professional, and committed to a career within the marina industry. CMOs are recognised as being most up to date in the latest procedures, techniques, industry regulations, and requirements.

CMOs have one of the tightest professional networks in the world and regularly share tips and information with one another, ensuring that each is up to speed with the latest technologies, processes, and regulations. The knowledge a CMO receives through this network makes him/her a highly qualified, respected, and able manager.

The CMO qualification process assesses the following real-world abilities:

- Understanding of Financial management.
- Sales and marketing management.
- Understand the regulatory obligations of the marina business.
- Successful bottom-line management.
- Evidence of high character and ethical standards.
- Supervise and manage people.

The CMO designation provides a doorway to greater earnings potential and professional recognition. CMOs complete rigorous education and training developed by the national and international marina industry and must meet specific experience requirements. The CMO accreditation is the start of the Certified member accreditation pathway and paves the way for completing the CMM or CMP accreditation in the future as they gain industry knowledge and experience throughout their career.

CMO's are committed to continuous professional development and annual reaccreditation.

## Benefits of becoming a CMO

### Higher Earnings

Becoming a Certified Marina Operator (CMO) can significantly boost your earning potential. Employers increasingly seek top-tier qualifications, and holding the CMO designation can lead to greater career opportunities. This credential not only enhances your professional profile but also reassures all stakeholders of your commitment to excellence in marina management.

### Preferred Employment Opportunities

With the CMO designation, you position yourself as a sought-after candidate in the marina industry. More marina stakeholders and managers are looking for highly qualified persons to incorporate into their businesses, and the CMO is recognised globally as the hallmark of professionalism. This credential signifies your dedication, expertise, and up-to-date knowledge of industry standards and regulations, making you a top choice for employers.

### Networking opportunities and CM Meetings

As a CMO, you gain access to exclusive certified members' meetings, offering valuable networking opportunities with fellow professionals. Engage in knowledge sharing, collaborate with like-minded individuals, and participate in professional development sessions tailored to the marina industry. These connections can enhance your career prospects and keep you at the forefront of industry trends.

## Certified Marina Operator Application Process

### CMO Application Requirements Checklist

To successfully apply to become a Certified Marina Operator, you must meet the following prerequisites. Note if you do not align with these prerequisites, you may be more suited to the Certified Marina Manager or Certified Marina Professional accreditations.

Criteria	Check
Three years marina management experience, <b>with three of these years being the immediate past three years.</b>	
Manage a marina operation with an annual gross operating revenue of AUS500,000, £ 300,000, €375, 000, or equivalent. Or if less, in an amount approximating the 'average' annual operational revenues of what would be reasonably considered as comparably sized marina facilities within the geographical region. or Manage a marina business with at least 50 boats in wet berths, mooring and /or dry stack spaces	
Spends at least 60% of their time doing: financial planning, marketing, customer service and people management	
In full time employment in a Marina or a Marina Related Business.	
Performs all 6 core management functions and at least 2 non-core functions during each of the qualifying periods	
An active member of a marine related membership organisation.	
Has completed the Advanced Marina Management Course within two years of certification application.	

The Global Marina Institute reserves the right to grant special considerations and exemptions to the above criteria in exceptional circumstances.

## Appointment of a Mentor

The mentor program serves as a valuable resource for individuals who have completed the Advanced Marina Management Course and are looking for guidance in their Certified Marina (CM) pathway. While participation is optional, having a mentor can offer significant benefits in navigating the application process and expanding professional networks.

The relevant industry body can assist in connecting Mentors and Mentees, although it is the responsibility of the Mentee to undertake this process.

### Mentor Appointment Process

#### 1. Eligibility

Graduates of the Advanced Marina Management Course are encouraged to connect with a mentor through their relevant association (MIA or BM). Mentors are typically selected based on their expertise, experience, CM status and location to best support the mentee's professional journey.

#### 2. Mentor Selection

Mentors should have relevant industry knowledge to the CM pathway the mentee is looking to apply for. When seeking a mentor, mentees may consider factors such as:

- Industry experience and expertise
- Specialisation within marina management
- Availability for guidance and discussions

#### 3. Mentor's Role

Mentors can provide valuable insights and support by:

- Offering guidance on the CM application process, including key requirements and deadlines.
- Introducing mentees to the broader CM network and industry professionals.
- Assisting with obtaining letters of reference.
- Sharing career experiences and best practices.

#### 4. Mentee's Role

To make the most of the mentorship experience, mentees are encouraged to:

- Take initiative in engaging with their mentor.
- Clearly communicate their goals and expectations.
- Follow through on suggestions and tasks.
- Express appreciation for their mentor's time and expertise.

#### 5. Duration of Mentorship

While mentorship support is flexible, most mentees find guidance helpful throughout the CM application process, typically lasting up to two years. Additional support may be available beyond this period based on individual needs.

### CMO Application Process Explained

#### General Comments

- Where possible electronically fill out all forms and paperwork. Avoid submitting handwritten documentation.
- Answer all the questions completely and accurately, referring to this Handbook as you do so.
- Use the application checklist to ensure your application is complete. Your application cannot be fully processed, and you cannot be approved as a candidate until it is complete.
- Application forms and supporting documentation must be email to the relative associations staff.
  - o Marina Industries Association – [education@marinas.net.au](mailto:education@marinas.net.au)
  - o British Marine - [training@britishmarine.co.uk](mailto:training@britishmarine.co.uk)

#### Application checklist

Use the below checklist to ensure you include all necessary documentation when submitting your CMO application.

- o Application Form
- o Employment Narrative report
- o Organisation Chart
- o Photographs of facility – Limit of 15 images
- o Marketing Material
- o Latest Annual Marina Operating Statement (Please mark this as confidential and submit separately if you do not want this information to be circulated to the review panel)
- o Letter of reference one – Past or present employer
- o Letter of reference two – An active Certified Member
- o Letter of reference three – A Marina Business Professional.
- o Letter of reference four – Any of the above
- o Copy of AMM certificate
- o Application fee paid

#### Certified Marina Operator Application Payment Policy

After submitting your applications to the Marina Industries Association or British Marine, an invoice for a processing fee will be issued from the respective organisation. This fee must be paid within 28 business days of receiving the invoice; it is non-refundable and must be paid regardless of the outcome of the CMO application. The fee covers the administrative costs associated with submitting and processing the CMO application.

Refer to the relevant Associations fee structure for specific pricing as pricing is subject to change. Once you have paid the application fee you will also be required to pay the Certified Member Accreditation fee which is a yearly fee for all Certified Members.

## Application form detailed explanation.

### *1. Biographical Information*

Please complete this section with your contact details. It is important to include both your personal and professional contact details, this ensures, if in the case you move places of employment, we can still contact you.

### *2. Employment History*

List the names and addresses of marinas that you have been employed at in the last 10 years, list your current role first. You must outline you the position held, duration and who your line manager was.

The periods of employment in this section should align with the periods outlined in section seven.

The Review Panel may request evidence of employment to verify experience and dates of employment listed in the application form. Evidence can be in the form of an employment contract, letter from past employers verifying employment or other documentation that can reasonably verify employment type and dates.

### *3. Marina/Marine Association Membership*

To apply for CMO membership, you must be an active member of your local or regional marina association, such as the Marina Industries Association, British Marine or TYHA. This membership can be through your employer, or if your employer is not a member of MIA, British Marine or TYHA, you can obtain an individual membership. Note individual membership is only available through the MIA and will be evaluated on a case-by-case basis.

You may also wish to mention any other civic and professional organisations you are involved in e.g. Superyacht Australia or The Coast Guard.

### *4. Education, training, and Professional Development*

Please list any college, university, or professional qualification you have achieved, you **do not** need to submit copies of your certificates, although the review panel may request evidence verifying education, training and or professional development listed.

If you attended an Intermediate marina manager's course, please include the details required. You do not need to submit a copy of your certificate.

Please complete the details regarding the Advanced Marina Management Course you attended, you must include a photocopy of your certificate with your supporting documentation.

List any courses and or professional development sessions you have attended in the last five years. This could include Marina Conferences, seminars and workshops.

## 5. References

Refer to Appendix for a reference template to send to referees.

To support your application, you need **four referees/letters of recommendations**

Note the following criteria for letters of reference:

- Members of the GMI steering Board and CM review panels cannot act as Referees
- Current employees and relatives cannot act as Referees.
- In total four letters of reference are required
- Letter of reference one – Past or present employer
- Letter of reference two – An active Certified Member
- Letter of reference three – A Marina Business Professional. A business associate from another marine related company, professional body from the marina industry, or if volunteer work is carried out from the charitable organisation. Note the Business Professional must be reasonably related to the Marina Industry they should be familiar with your character and capabilities over several years.
- Letter of reference four – Any of the above

If a referee does not meet the above criteria due to extenuating circumstances, the applicant may submit a request to the GMI for special consideration.

Please ask the Referee to directly email a copy to your relative association. Do not post a paper copy. Send a copy to your relevant association, as directed by your associations policies and procedures.

MIA – [education@marinas.net.au](mailto:education@marinas.net.au)

BM - [training@britishmarine.co.uk](mailto:training@britishmarine.co.uk)

## 6. Other information

This information will be treated confidentially. If you answer yes to any of these, you must provide a written explanation on a separate sheet.

## 7. Experience Credit Form

The information you provide here will determine whether your experience earns credit towards the CMO designation. When “the reporting period” is referenced in this section it is in reference to the time spend at a facility as outlined in the employment history section of the application form.



## Part One Portfolio information

Indicate your management experience in each area below, beginning with column 1 to list your most recent experience. The dates at the top of the columns should represent each marina job and relate to the employment history provided in the “employment history” section of the Application Form. Attach further pages if necessary.

**Item 1 Marina Information:** For each reporting period outline the storage capacity of the marina. This is needed to determine if you pass the facility size pre-requisite. The reporting period is defined as the time spend at each place of employment.

**Item 2 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 yourself or one of our subordinates, please highlight the dollar amount and make note of this in the “additional comments” section at the end of the table. This is needed to determine if you pass the facility turn over pre-requisite if the storage capacity pre-requisite is not meet.

**Item 3 Proportion of Time:** 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 prerequisite.

**Item 4 General Manager Supervision:** For each period in question, specify how many months you worked as a General Manager, or reporting directly to a General Manager. This is needed to determine if you pass the Management Experience prerequisite.

**Item 5 Employee 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 also submit the required marina organisation chart in your supporting documentation.

## Part Two Management Experience

Here you will indicate what activities you performed at marinas reported in Part One Portfolio Information, beginning with column 1 to list your most recent experience as indicated in the previous table. For example, assume that for Period 4 on the previous page you inserted the dates from 1/1/23 to 7/7/24, and below you listed the marina you managed. On the current page under column 4, you should check the functions you performed from 1/1/23 to 7/7/24 at this same marina.

This table is broken into two sections, ensure both sections are completed.

Note you must be able to check the required 18 of the 26 functions to receive any experience credit for the corresponding period. The Review Panel looks for satisfactory minimum experience in this section.

## 8. Comparably sized facility information

Provide information regarding a minimum of five marina facilities that are comparable to your marina within your geographical area.

Note this section does **not** need to be completed if the applicant's current marina has a gross operating revenue of AUS500,000, £ 300,000, €375, 000, or equivalent or more or at least 50 boats in wet berths, mooring and /or dry stack spaces.

## 9. Employment Narrative Report

The narrative report provides evidence to prove you have performed all 6 core, and three non-core Management Functions, which are a pre-requisite for the CMO certification. Core Functions are referenced in the below table. You will need to divide the report into three sections: Personal and Career Introduction, Narrative Report and Appendices.

### 1) Personal and Career Introduction

Write a maximum 1000 words single spaced:

- a) Your personal reasons for entering the marine industry, eg. Passion for boating, holidays on family boat etc.
- b) Your education and qualifications, particularly in the marine industry
- c) Your career development until your current position, eg. the companies and roles you were in, opportunities and challenges you faced, career turning points etc.

### 2) Narrative Report

For this section, you should write each core function as a subheading. Then under each subheading describe how you fulfilled this management function in your marina roles, particularly in your latest role. Reference should also be made to each management function ticked in the experience credit form. To substantiate each of your claims, you should not merely describe what you did, you must also provide documentary evidence which should be referenced in an appendix

1. Manage People
  - A job ad you posted
  - First page of a performance management report of an employee (anonymised)
  - A training checklist you developed for your staff
2. Manage Facilities
  - A maintenance schedule you developed or updated
  - Letters or proposals on best profit ideas which were implemented in your marina eg. changes to berthing rates, new income streams
3. Manage Marina Operations
  - A dock walk checklist you developed
  - A standard operating procedure you developed (first page only)
  - A customer survey you developed and recommendations you implemented which resulted from it

Next to each claim in your narrative, place a reference to the relevant documentary evidence and place the evidence in the appendices. Please do not clog up the narrative with this documentation. See examples below:

- 1) See appendix 1.1 for an example of a job description I wrote for a new dockmaster at XXX marina in 2014.
- 2) In appendix 4.2 is a standard operating procedure I developed for refuelling.

Number the appendices for each piece of evidence, therefore if you supply 2 pieces of evidence for one management function (eg. the 1<sup>st</sup> management function), you should label this as 1.1 and 1.2.

In the appendix of this handbook you can see an excellent example of narrative report of a past applicant. You should use the same format.

### Core Functions

Certified Marina Operators are required to provide evidence that they have carried out all six core functions, and at least three non-core functions.

Functions	Tasks
<b>CORE</b>	
1 Manage budgets	<ul style="list-style-type: none"> <li>Awareness and input to:                             <ul style="list-style-type: none"> <li>Prepare &amp; monitor operational budgets</li> <li>Manage cash flow</li> </ul> </li> </ul>
2 Manage people	<ul style="list-style-type: none"> <li>Manage staff</li> <li>Performance manage and develop staff</li> </ul>
3 Manage facilities	<ul style="list-style-type: none"> <li>Ensure optimum yield/profit on all facilities</li> <li>Plan, implement &amp; monitor scheduled maintenance &amp; repair</li> </ul>
4 Manage marina operations	<ul style="list-style-type: none"> <li>Manage day to day operations of marina</li> <li>Develop and implement customer service strategies</li> <li>Develop and implement reporting &amp; recording systems</li> </ul>
5 Comply with regulations	<ul style="list-style-type: none"> <li>Keep up to date with regulations including H &amp; S, environmental &amp; legal</li> <li>Ensure compliance with all regulations</li> </ul>
6 Build relationships with stakeholders	<ul style="list-style-type: none"> <li>Develop relationships with stakeholders and local groups eg: local councils, regional government, harbour authorities</li> </ul>
<b>NON-CORE</b>	
7 Manage contractors & suppliers	<ul style="list-style-type: none"> <li>Appoint contractors/suppliers</li> <li>Monitor performance of contractors/suppliers</li> </ul>
8 Promote the marina	<ul style="list-style-type: none"> <li>Oversee the promotion/marketing of the marina</li> </ul>
9 Manage future development of marina	<ul style="list-style-type: none"> <li>Make recommendations to Board/owners for improvements to marina</li> <li>Prepare capital budget requests</li> </ul>
10 Manage boatyard operations	<ul style="list-style-type: none"> <li>Manage hardstanding/dry stack operations</li> <li>Manage lift out and moving of boats</li> </ul>
11 Manage tenants	<ul style="list-style-type: none"> <li>Develop relationship with tenants</li> <li>Review lease terms/agreements &amp; mix of tenants</li> </ul>

You will need to **give examples** of how you performed the functions in your **Employment Narrative Report**

## *10. Supporting Documentation Explained*

### Application Form

The Application Form should be electronically completed and submitted to the relevant association as a PDF document.

### Employment Narrative Report

The Employment Narrative Report should be completed electronically and submitted as a PDF document to the relevant association. This PDF should also include the appendix. If any items in the appendix cannot be included in the PDF, they should be placed in clearly labelled shared folders using software compatible with the relevant association. Please check with the relevant association for guidance on the best way to share this information.

### Organisation Chart

The organisational chart should clearly depict the structure of your business, with an emphasis on your role and position within it. To make this clear consider including your name next to your title. Keep the chart simple, easy to read, and visually accessible, ensuring that it's easy to identify your position in the hierarchy, along with the individuals above and below you.

### Photographs of facility

Include quality images of your facility that provide a clear and detailed representation of its appearance. Highlight key features and areas of interest, particularly those referenced in other sections of your application. Ensure the images effectively convey the layout and attributes of your facility, as the review panel may be unfamiliar with it and may not have visited in person. A maximum of 15 images can be submitted.

### Marina Promotional Material

Include any marketing and promotional materials that you use to promote your marina. These materials should reflect the resources you have developed to attract customers and showcase your business. This may include brochures, advertisements, social media content, or other promotional tools. Ensure that the materials highlight key aspects of your marina, such as services, amenities, and any unique features, providing the review panel with a clear understanding of how you promote your business.

### Latest Annual Marina Operating Statement

Include the latest annual marina operating statement as part of your application. If you prefer this information not to be shared with the review panel, please mark it as confidential and submit it separately. In such cases, the association processing your application can review the document directly to verify that you meet the required criteria for gross operating revenue, ensuring your application remains compliant.

### Current CV

Include an up-to-date CV with your application, attached as a PDF document. This should be a professional reflection of your career to date, highlighting relevant skills, qualifications, and achievements that support your application.

## Certified Marina Operator Re-Accreditation

### Overview

The GMI continuing Professional Development Program (CPD) has been designed to encourage Certified Members to undertake professional development, so they maintain appropriate skills and learnings in management practises in the marina industry. It provides a structure that enables members to formally document the ways in which they manage and extend their professional skills and knowledge. At the same time, it also maintains the reputation and high standards of Certified Members Globally.

### CMO Re-Accreditation Requirements

All Certified Members, except honorary CM's, are required to complete a minimum of 30 hours of professional development per year to retain their active status. Re-accreditation for the MIA will take place each year in January. Re-accreditation for British Marine will take place each year in April.

A certified Member must be actively employed in the industry to be re-accredited and an active member of a marine related membership organisation.

A CMO must be engaged in the marina and or shipyard industry. This is defined as a person who wholly or partially is involved in the operational running of a marina and or shipyard facility. Typically, CMO's report to a higher-level supervisor such as a marina manager, general manager or CEO.

A Certified Member cannot hold more than one active certification. For example, if a CMM becomes a CMP, they swap one active certification for the other.

GMI Steering Board has the final right/decision in the re-accreditation of all Certified Members. The GMI Steering Board may when necessary elect sub committees to assess individual cases where appropriate.

### Special Circumstances

The Global Marina Institute reserves the right to grant special considerations and exemptions to the above criteria in exceptional circumstances. Special circumstances will be reviewed by representatives of the Global Marina Institute and must be submitted in writing to the relative association (MIA or BM).

### CMO's moving to CMM Positions:

A CMO who through changing jobs or change in circumstances meets the criteria for CMM may apply for CMM status and be granted it subject to satisfactory completion of the CMM application form and approval by the review panel.

### Career Break Guidelines

If a CMO stops working in Marina Management, as defined above, they have two years to either meet the criteria for another certification, re meet the CMO criteria or be classified as inactive. For example, a CMO who has stopped working as a marina manager prior to 1 July 2014 will have until 20 June 2016 to move to another certification if they meet the criteria, re meet the CMO criteria through re employment or be classified as an inactive CMO.

A Certified Marina Operator (CMO) who takes a career break must apply for a career break exemption through their relevant association. This application will be reviewed by the relevant managing association.

Certified members who are on a career break are exempt from having to pay their yearly accreditation fee and completing their CPD points for the extent of their approved career break.

A CMO can regain active status following a Career Break by:

- **Working in a Suitable Position:** The individual must work in a position that meets the certification criteria.
- **Meeting CPD Requirements:** They must fulfill the annual Continuing Professional Development (CPD) target hours for re-certification.
- **Accreditation fee is paid**

### CPD Activities and Conditions

The CPD period is calculated over one calendar year.

CPD activities have been classified into structured learning, unstructured learning, private study and service to the marina industry. The scheme recognises a significant amount of learning is not only structured but achieved on the job with tasks such as preparing a submission for the extension of a marina or writing an environmental management plan. In addition, much learning is self-directed as reading industry journals or magazines.

If a certified member receives payment for services rendered to the Marina Industry, such as a presenter fee for delivering a course, that time will not be counted towards Continuing Professional Development (CPD) points. However, reasonable expenses incurred by the certified member—such as accommodation, meals, and transportation—are not classified as payment. If a presenter is reimbursed for expenses but does not receive explicit payment, then their service to the Marina Industry may be counted towards CPD points.

### Minimum and maximum hour restrictions

#### *Minimum Hours:*

To encourage participation in MIA/BM structured learning activities (eg. MIA/BM courses and conferences) and giving back to marina industry (eg. Mentoring a CM application), certain CPD types have a requirement of minimum hours that must be accrued annually. These are highlighted in bold in the below table.

#### *Maximum Hours:*

To ensure certified members cannot maintain certification purely through unstructured learning and or private study, maximum hours have been stipulated to two CPD types as indicated in bold in the below table.

#### *Double Hours:*

To encourage Certified Members to contribute directly to MIA/BM activities (eg. Presenting to MIA/BM courses), activities relating directly to MIA/BM activities can be allocated double the number of hours.

### Carrying over unused points:

Unused CPD hours can be carried over to the following year, but only for one year. If Certified Members do not have enough hours for re-accreditation in the current year, they can carry over a maximum of 15 hours from the previous year. However, these carried-over hours will only apply to the relevant CPD category. For example, if you have 10 hours of unstructured learning CPD from 2024, those 10 hours can only be applied to unstructured learning CPD points for 2025, not to service to the marina industry.

### Honorary CM pathway

For Certified Marina Operators who have accredited through the Honorary CM pathway the completion of a minimum of 30 hours of professional development per year is not required to retain their active status. These members are however encouraged to participate in Certified Member events and contribute to Marina Industry.

### CPD Hours Description

CPD Type	Details	Evidence
Structured Learning:	On campus, online or distance courses, short courses, workshops, seminars, webinars, discussion groups, conferences, study tours, in-house training. Normally delivered by or facilitated by experts in the field. <b>Minimum 10 hours</b>	Enrolment or registration notices, emails outlining content of learning event and proving participation.
Unstructured Learning	Normal work activities that have extended your knowledge. E.g., drafting new emergency procedures or environmental management plan. <b>Maximum 10 hours</b>	New plans or procedures drafted by you with a signature from your manager verifying it is your work and newly created.
Private Study	Reading of books, magazines, manuals related to marinas, business and other relevant fields. <b>Maximum 5 hours</b>	Reading diary detailing date read, title, author and time spent
Service to the Marina Industry	<ul style="list-style-type: none"> <li>- Serving in a volunteer capacity on boards and committees of MIA/BM or other boards and committees which advance the marina profession.</li> <li>- Mentoring a CMO/CMM/CMP applicant</li> <li>- Preparing and contribution to submissions on management and technical standards</li> <li>- Preparing and or delivering courses, conferences, workshops.</li> <li>- Contribution to public dialogue and advocacy</li> </ul> <b>Double Hours for service to MIA/BM</b> <b>Minimum 5 hours</b>	<ul style="list-style-type: none"> <li>- Emails evidencing involvement and hours spend in meetings</li> <li>- Record kept by MIA/BM</li> <li>- Emails and or documents evidencing involvement</li> <li>- Emails and or documents evidencing involvement including papers or material produced</li> <li>- Email and or documents evidencing involvement</li> </ul>



### Recording the CPD hours

All certified members, who are required to record CPD points, will be asked to keep a record of their CPD as per their relevant association's guidelines.

### Active CMO's

All CMO's who are successfully reaccredit will be listed as active on the GMI, Marina Industries Association, and British Marine websites and will be included in the circulation list for certified member meetings and events.

### Inactive CMO's

Individuals who choose not to reaccredit will still retain their original certification but will be listed as inactive and will not be invited to certified member events or meetings.

To regain active status a CMO must be able to demonstrate they are

- **Working in a Suitable Position:** The individual must work in a position that meets the certification criteria.
- **Meet CPD Requirements:** They must fulfill the annual Continuing Professional Development (CPD) target hours for re-certification.
- **Annual accreditation fee and reactivation fee is paid.**

### Audit Policy and Process

Certified Members may be audited annually. All Certified Members must retain evidence of personal development activities and submit this within 14 days if required. If satisfactory evidence cannot be provided within this period, the Certified Member will be classes as inactive and will need to follow the appropriate steps to reaccredit.

## Appendix

### Reference/Letter of Recommendation

Return this completed form to:

AUSTRALIA/ASIA: Industry Education Officer at [education@marinas.net.au](mailto:education@marinas.net.au). DO NOT copy this letter to the applicant.

<b>Applicant Name</b>	
<b>Address</b>	
<p><b>To the individual completing this Recommendation letter:</b></p> <p>The person named above has applied for candidacy as a CERTIFIED MARINA Operator with the Global Marina Institute and has asked you for a recommendation.</p> <p>Please answer the questions below in as specific and candid a manner as possible within seven days. When complete, mail this letter to the address above</p> <p>Completing this recommendation is a qualified privilege which attaches and absolves you and the Institute of liability, provided your communication is made in good faith and is limited to the issue at hand.</p> <p>You can be assured that your answers are confidential, and the applicant will not have access to this letter</p>	
<b>Name of Person Completing This Form</b>	
<b>Position/Title</b>	<b>Employer</b>
<b>Address</b>	
<b>Telephone Number</b>	
<p><b>Are you:</b></p> <p>___ a CERTIFIED Member?</p> <p>___ an employer or former employer of the applicant?</p> <p>___ other (explain relationship at right, please)</p>	
<b>My relationship with the applicant is:</b>	
How long have you known the applicant?	

**Under what circumstances have you known the applicant?**

**Describe the applicant's moral character, integrity, and sincerity of commitment to marina management as a profession?**

*Please give specific examples, below, where you describe the individual's character and fitness for the CMO award*

**If you are a current or former employer, how do you rate the applicant's ability as a marina manager?**

**Do you have any reservations about recommending this person for CMO designation?**

Additional Comments:

NOTE: Letters of reference for candidates for the CMO designation are VERY important to the selection process. Please give specific information, examples and reasons for your endorsement, or reservations about this candidate. If the information is not complete, the MIA will need to request further information about the candidate from you.

I \_\_\_\_\_ can, \_\_\_\_\_ cannot, recommend this applicant for CMO candidacy.

Date:

Signature:

## Employment Narrative Report Example

### MARINA MANAGEMENT FUNCTIONS

#### 1. Manage Budgets

Listed below is the various tasks and duties I perform or my staff perform under my supervision to ensure the marina operates within our predetermined yearly budget and profit and loss expectations.

- Management of cash flow and Daily reconciliations – **all** transactions for the day are reconciled and banked, whether they be as modest as usage of the showers or yearly berthing fee payments. I am ultimately responsible for all cash on the marina, fuel wharf floats, change for laundry and petty cash. I oversee the handling and reconciling of all these monies.
- The annual review of operating accounts, commence budget process for next financial year for operating accounts, capital works and marketing are done by myself annually. This review forms the basis of the next FY budget.
- Daily monitoring of both XXX storage, XXX storage and wet boat berthing occupancy via our berthing software, XXX. I oversee all accounts XXX to ensure the recurring fees have been correctly set and appropriate invoices have been raised. I also review yearly prepaid agreements and negotiate with the boat owner on the proposed new yearly rate.
- I review the monthly operating budgets and accounts such as the Profit & Loss information. Any variances outside of my budget are review and investigated. I forward my findings to my manager as required.
- Monthly review of all debtors, both land based tenants and dry/wet berthing customers. As required, I will contact our debtors and have them settle their account. I also work with certain debtors to arrange for part payments or other arranges during their financial difficulties.
- I review of all current and near-future capital works projects to ensure their timely and cost effective delivery.
- I am charged with reviewing the Quarterly operating accounts with my manager.

Working with my manager, I review and set all berthing fees and charges to be implemented in the next financial year according to boat/berth size and type. Authority to vary the rates once set must be approved by me or my manager.

All purchasing is controlled and monitored by me by way of competitive tendering processes for major works including capital expenses and the negotiation of on-going supply contracts where required. This process also requires me to approve all invoices once verified and matched to the required product or service. All expenses are done within a budget that is agreed upon by the board of directors. I have the authority to commit the company to purchases up to \$XXX and, with approval, much larger amounts with supporting documentation. Recent examples CAPEX purchasing I have facilitated includes a XXX for \$XXX, a new XXX for the marina XXX for \$XXX and XXXX for \$XXX.

We shortly will be upgrading our XXX at a cost of approx. \$XXX. My manager has tasked me with the Project Management role for this project. Annual capital expenditure budgets can be up to \$XXX per annum dependant on the work required in an upcoming financial year.

Appendix:

- 1.1. Screen shot of our cash management system used daily to enter all financial transactions and fuel reconciliation. I use this program to review the transactions, fuel accounts and cash sales. I also need to explain any variances to my manager and accountant.
- 1.2. These are some recently completed CAPEX applications. These are forwarded to My manager and Financial Controller for approval. The normal process is that I will source contractors, review the quotations, submit the CAPEX request and then engage the contractor to perform the works. Once completed I will sign off the invoice for payment.
- 1.3. This is quotation for Major CAPEX works at the marina. I have been working on this project for almost XXX years. I have been liaising with the equipment provider, electricians, plumbers and XXXX authority during this period. The project is due for completion by XXXX.
- 1.4. This is a sample of one of the many letters I send to members regarding renewal of yearly agreements.

## **2. Manage People**

Working with my manager I have responsibility to hire and performance manage all on-site staff employed by our marina, currently some XXX people. I regularly engage all staff through staff meetings or individually as required.

For recruitment we use a talent management software called XXX. Any responses to our online recruitment ads are forwarded to XXX where I will review and either reject or approve their job application. The system auto responds to the unsuccessful candidates which makes for a very smooth process. I call the 1<sup>st</sup> round successful candidates for a phone interview. I then progress the suitable ones to a face to face interview at the marina which normally I have my manager attend.

I create the staff rosters which is managed via a software program called 'XXX. All rostering, leave and payroll matters are handled in this system. This system allows staff to clock on/off daily by using a finger scanner which is then used to calculate the hours worked, particularly with casual staff. Various types of leave applications are also handled through this system. I am charged with the correct operation of XXXX at the marina.

We use a HR software program called XXX to manage our staff's experience and qualifications, employment history and personal information. As staff gain more qualifications I will update their profile on XXX. We also use XXX to store staff's private information.

It is my role to arrange for our staff and tenants to be trained by external professionals in such areas as Fire Safety, First Aid, XXX licences and working at heights safety. I regularly conduct training drills with staff including use of the fire pumps, vessel salvage and mock emergency situations. I keep records via our HR software XXX of what qualifications and accreditations each staff member holds and when they will be due for renewal.

Appendix:

2.1. This is a screen shot of the HR software program XXX which is used to manage the staff from a HR perspective, qualifications and experience.

2.2. This is a screen shot of XXX which is the management tool for leave and attendance. I approve all of the staff's shift via XXX and monitor and approve any leave requests via the system. I upload the rosters into XXX monthly.

2.3 This is a sample of our monthly staff roster for the marina. I send this to the staff as required and normally with a couple of paragraphs about staff related news or training.

2.4 Minutes from a recent team meeting I held with my staff. We hold team meetings once a month and additional meetings on certain days if there is a special event such as XXX meetings or similar.

### **3. Manage Facilities.**

As well as the longer term issues that impact the marina I also have direct input and control on the day-to-day repairs, maintenance and asset management of the facility. I prepare a fully budgeted and chronological maintenance plan which is then broken down into appropriate areas for R&M of the various parts of the property. This programmed maintenance system allows us to programme and monitor the various works in advance in each specific area of the facility. Weekly maintenance tasks are then allocated off this programme and followed up to the conclusion of the job.

I review all parts of the property to ensure we are receiving optimum yield. A good example of this was that we were getting very little yield from a couple of berths that were in an XXX location. I was able to convert these into XXX storage on pontoons. This move to XXX storage increased the yield on these berths by XX% and provided an additional service to our boat owners and a new income stream for the marina.

We conduct regular safety site audits to identify any hazards and risks and log all potential areas of concern via our group wide cloud based safety and compliance reporting software system called XXX. I work with the group safety manager to ensure the property is compliant in all areas of safety. I manage the works as required to rectify/ remediate wherever possible.

At our marina we operate our own XXX system, fire XXX system manage the ongoing inspections and certification of this firefighting system.

We operate a single XXXT capacity forklift under a strict maintenance regime to ensure uninterrupted service. I arrange for the preventive maintenance of the machine to ensure it is most reliable.

I encourage our staff to take a proactive approach to identifying maintenance issues such as plumbing or electrical issues. Either myself or my assistant will contact the applicable tradesperson to attend the site and fix the problems. Once completed I will approve the invoices and forward for payment.

Appendix:

3.1 This is the homepage of our XXX online reporting program which I use to report incidents and hazards on the property.

3.2 sample of recent job lists for the dock masters. This is a live document and is constantly update and renewed.

3.3. This is a recent copy of an invoice with the description of the works that were performed on the forklift. It is important that I have a good overall understanding of the forklift and it major components to ensure the works are performed correctly and within expected budgets.

3.4 I reviewed and updated this forklift rack movements record so that it includes pre and post operation checks. The previous version had no safety checks on it. This document is used every day by the forklift operator to record the movements within the XXX facility.

3.5. This is a chronologically maintenance budget template that I use when creating maintenance schedules. We program most works outside of the XXX period. We also have recurring works set such as pothole repairs in the car park to be completed during the XXX season.

3.6. Installing the XXX pontoons in the XXX location increased the yield for this space by X%. Over the last X years I have added XXX pontoon systems to the marina.

3.7 Picture of XXX pontoons in XXX location.