

## DESIGNEE VERIFICATION, APPROVAL & INSTALLATION POLICY

As a core goal of the Institute of Real Estate Management, it is the responsibility of the Chapter to assist members in achieving their designation of CPM<sup>®</sup>, ARM<sup>®</sup>, and ACoM.

### Chapter Duty of Support:

It is the responsibility of the current President to complete and return to IREM National any required documentation to complete a member's designation application within 10 business days of receipt of the verification or approval request. This may include, but is not limited to:

- Verification of Experience for CPM<sup>®</sup>s CPM Candidate Members are encouraged to submit their experience at the earliest opportunity. This allows the member the opportunity to focus on any areas that do not meet the experience requirements prior to finishing the course work. The experience of each member must be verified with a personal phone call prior to designation approval.
  - Step One: The member submits the experience to IREM National, which includes current title, length of time in industry, portfolio size, acknowledgement of 19 of the 36 required functions, and the name and phone number of a supervisor.
  - Step Two: IREM National reviews the application and verifies that the portfolio size, length of time in the industry, and at least 19 functions have been selected. Only forms that meet the national requirements are forwarded to the local Chapter.
  - Step Three: IREM National forwards the Experience Form to the President and IAE, and a letter to the member, alerting them that the Chapter now must validate the experience form.
  - Step Four: Upon receipt of the Experience form, the IAE contacts the President to verify that the form has been received and to confirm that the confirmation can be completed by the deadline of 10 business days. If the President is unable to commit to the 10 business day deadline, the IAE will contact another Officer, beginning with the President-Elect, to garner a commitment.
  - Step Five: The President makes a phone call to the supervisor of record on the Experience form. The purpose of this call is to confirm supervision of the member and to confirm that the form was indeed signed by the supervisor. The call is not intended to be confrontational, nor is it intended to "question" the honesty of the supervisor.
  - Step Six: The President calls the member, and in a conversational way, discusses the experience identified on the form with the member. It is not appropriate for the President to ask questions directed at experience that is not specifically indicated on the experience form, nor is it appropriate to discuss items on the form that have not been selected by the member as an area of functional experience.
    - If the member is able to adequately support the experience listed on the form, the President is to sign the form, and email the form back to IREM National with a copy to the IAE.
    - If the member is not able to adequately support the experience listed on the form, the President is to call an emergency meeting of the Executive Council, and discuss the concerns. A follow-up call is to be made to the member by another Officer, or by the RVP, as identified by the Executive Council.
    - If the second call yields a lack of confidence in the experience of the member, then the Experience form may be rejected, requiring signatures from both Officers, or the President and the RVP, with objective information substantiating the rejection of the experience, as well as a list of specific areas where the member can increase

- their experience to be approved in the future. The form is to be emailed to IREM HQ, with a copy to the IAE.
- If the second call yields a conflicting outcome, with one Officer believing that the experience is not substantiated, and one finding the experience adequate, the Executive Council will accept the positive experience review, and the experience form is to be approved and signed by the supporting Officer or RVP, and mailed to IREM HQ, with a copy to the IAE. The negative review becomes null and void.
- CPM Approval - Once a CPM Candidate finishes their course work and is ready to be installed, IREM HQ will forward a form to the Chapter, which must verify the following within 10 business days:
    - o Membership dues are current
    - o Member has attended at least 2 member meetings in the past 12 months.
      - ☐☐ If the member is an outlying member, and distance is a realistic obstacle, the Chapter may waive this requirement in lieu of other criteria. However, the form does not have provisions for exceptions; mark the form to indicate that the meeting requirement has been met; exceptions are managed internally within the Chapter.
      - o Step One: Upon receipt of the CPM Approval Form, the IAE contacts the President to verify that the form has been received and to confirm that the confirmation can be completed by the deadline of 10 business days. If the President is unable to commit to the 10 business day deadline, the IAE will contact another Officer, beginning with the President-Elect, to garner a commitment. The IAE provides validation at this time of dues and meeting status.
        - ☐☐ The form will indicate whether or not the experience has already been verified.
          - If the form indicates that the experience has already been verified, there is no other verification of experience required.
          - If the form indicates that the experience has not been verified, follow the steps listed for "Verification of Experience" before continuing.
      - o Step Two: The President verifies the status of a Real Estate License, either by searching the Real Estate Commission online, reviewing documentation within the package provided by IREM HQ, or contacting the member directly. This form can be completed quickly, without placing a call to the member, if the license can be verified another way.
      - o Step Three: The President approves the form and emails the form back to IREM HQ, with a copy to the IAE. No CPM Approval Forms can be rejected without the consensus of the Executive Council.
  - ARM and ACoM members do not require experience verification, nor is there criteria for prior membership, attendance at meetings, or a current Real Estate License,

*\* The Chapter may substitute other means of participation for attendance at member meetings, if the member lives outside the meeting area. The form from National does not allow for substitutions; the President may select "yes" for member meeting attendance if the substitution has been made.*

#### Member Meeting Substitution Options:

- ☐ Write an article for a local publication
- ☐ Participate on a Committee
- ☐ Attend a National Conference
- ☐ Other participation as deemed acceptable by the Executive Council

**Certificate and Pin Distribution** Certificates and Pins are sent to the local Chapter for distribution. Receipt of the Certificate and pin is typically within 3 weeks of the final approval. Once the Chapter receives a certificate and pin for a member, proceed as follows:

#### **CPM<sup>®</sup>**

CPMs have already been approved, which includes ensuring their dues are paid. No other criteria is necessary to distribute the certificate and pin:

- Contact the member within one week of receipt of the certificate and pin
- Inquire if the member will be able to make it to the next member meeting for a formal installation.
  - If yes, hold the certificate and pin to be delivered during the next meeting
  - If no, ask the member if they would like to wait until the next meeting or have the certificate and pin mailed
  - Notify Executive Council of new designation and provide the contact information so that the Council members can contact the new designee to congratulate them
  - Change the membership status on the web portfolio
  - Announce the new designee in the next email blast

#### **ARM<sup>®</sup> and ACoM**

ARM<sup>®</sup> and ACoM members typically begin their membership with the receipt of their designation. There is no approval process, and most ARM and ACoM members will have outstanding dues, as their certificate and pin will arrive soon after their invoice is processed. The Chapter may not withhold an ARM<sup>®</sup> or ACoM installation until the dues are paid [per National].

- Contact the member within one week of receipt of the certificate and pin
- Inquire if the member will be able to make it to the next member meeting for a formal installation
  - If yes, hold the certificate and pin to be delivered during the next meeting
  - If no, ask the member if they would like to wait until the next meeting or have the certificate and pin mailed
- Notify Executive Council of new designation and provide the contact information so that the Council members can contact the new designee to congratulate them
- Change the membership status on the web portfolio
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#### **Formal Installation:**

The current President will facilitate the installation by reading the approved script provided by IREM National.

Approved: December 31, 2016