



**BÖMI SMA<sup>®</sup>**

**Designation Program**



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### Dear Systems Maintenance Administrator (SMA®) Graduate:

Congratulations on earning your designation! This is an achievement that will enrich your career as you apply your new knowledge and skills to your profession.

Your personalized official designation certificate is presently being processed and will be mailed to you separately. Please note that processing time for designation certificates varies and may take as long as three to four weeks from the date you receive this packet.

In the meantime, please review this packet, which provides all of the information you need as a designation graduate, including your participation in our Active Graduate Directory, how to save 10% as an active graduate, how to maintain your Continuing Professional Development (CPD) Program points, and more.

If you have questions regarding your SMA Designation, please contact BOMI International. Canadian graduates, please contact BOMI Education Canada.

Sincerely,

#### BOMI International

One Park Place, Suite 475  
Annapolis, MD 21401  
[www.bomi.org](http://www.bomi.org)

Phone: 410.974.1410 | 1.800.235.2664  
E-mail: [service@bomi.org](mailto:service@bomi.org)  
Fax: 410.974.0544

Hours: Monday—Friday  
9:00am—5:00pm ET

#### BOMI Education Canada

229 Yonge Street, Suite 400  
Toronto, ON M5B 1N9  
[www.bomicanada.ca](http://www.bomicanada.ca)

Phone: 647.256.1438 | 1.800.867.6049  
E-mail: [service@bomicanada.ca](mailto:service@bomicanada.ca)

Hours: Monday—Friday  
8:30am—4:30pm ET

## PROMOTE YOUR DESIGNATION

Earning your SMA Designation is a great accomplishment!

Why not share the news with others?



Make sure to keep your profile/contact information updated so you receive all of the information you need as a BOMI International graduate. Click [here](#) to update.

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### GAIN RECOGNITION

#### **Designation Acronyms and Logos**

As a designation graduate, you have permission to use the acronym or logo of the designation you have earned on your resume, on your business card/stationery, in personal advertising, etc.

By doing this, you play a key role in helping BOMI International preserve the recognition and value of our designation programs. Therefore, we ask that you please review our designation guidelines for information on how to properly use designation acronyms and logos.

Click [here](#) to review designation guidelines.

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#### **Notification of Graduation/News Release**

Send a letter of successful completion to your supervisor or to other designated representatives within your company to inform them of your achievement.

Send a news release about your new designation to your company's newsletter and to business and industry associations.

Click [here](#) to access notification documents.

#### **Promote on Social Media**

If you are on social media, share this achievement with your followers. Don't forget to tag BOMI International in your post!

- Facebook: @BOMIInt
- LinkedIn: @BOMI International
- Twitter: @BOMIInt

#### **Transcript Request**

You must fully complete a BOMI International transcript request to order your transcript.

# ACTIVE GRADUATE DIRECTORY

BOMI International's Active Graduate Directory is updated monthly to provide easy verification of active designation holders by name, designation(s), city, and/or state.

Note that only active graduates appear in BOMI International's online Active Graduate Directory.



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## ACTIVE vs. INACTIVE

An active graduate is a designation holder who is participating in the Continuing Professional Development (CPD) Program, which requires completion of 18 CPD points every three years.

If you do not comply with the CPD requirement, your designation will be considered inactive. If others contact BOMI International regarding your status, they will be notified that your designation is not active.

Please see [CPD Program Requirements and Guidelines](#) for more information on requirements that must be met in order to maintain an active status.

### 10% Active Graduate Savings

As an active graduate, you receive 10% savings on all BOMI International-sponsored courses, which can be used to fulfill your CPD point requirement. You must enter **BWGD1734** in the BOMI International Coupon Code field at the time of checkout to save. Canadian graduates, please contact BOMI Canada for a Redemption Code to enjoy your savings.

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## DIRECTORY INFORMATION

If your name appears in the directory without a city and/or state, please be sure to update your contact information as soon as possible.

Click [here](#) to update your information.

### Directory Opt-Out

You are not required to be listed in the Active Graduate Directory. If you choose not to appear in the directory, please click [here](#) to complete an opt-out form.

Click [here](#) to view the BOMI International Active Graduate Directory online.

# ADDITIONAL EDUCATION OPPORTUNITIES

As an SMA Designation holder, you have the opportunity to easily add even more value to your credentials by taking advantage of other BOMI International designation and certificate programs that coincide with your SMA Designation.

Click on a designation or certificate listed below to learn more about that program.

## EARN A CERTIFICATE

**SMA® Designation** courses may be applied to the following certificate program.

### Facilities Management Certificate (FMC)

An overview of information that is vital to running an efficient facility. Learn how to operate and maintain peak performance facilities.

- **Complete 3 Required Courses:**
  - Fundamentals of Facilities Management
  - The Design, Operation, and Maintenance of Building Systems, Part I
  - The Design, Operation, and Maintenance of Building Systems, Part II

**ALL FMC COURSES ARE REQUIRED FOR THE FMA**

## EARN A SECOND DESIGNATION

After earning your **SMA® Designation**, you are in a great position to also earn one of the following designations.

### HOW IT WORKS:

Upon earning the SMA Designation, you will have completed two courses (*Environmental Health and Safety Issues* and *Managing the Organization*) that can be applied toward the RPA and the FMA Designations.

You are also eligible to receive transfer credit for two courses (*The Design, Operation, and Maintenance of Building Systems, Part I* and *Part II*) that are also required for the RPA and the FMA Designations.

Therefore, after earning your SMA Designation, you can earn the RPA and/or the FMA Designation by successfully completing only four more courses.

### Real Property Administrator (RPA®)

- **Meet the RPA Experience Requirement**
- **Complete Additional Required Courses:**
  - Budgeting and Accounting
  - Ethics Is Good Business ShortCourse
  - Law and Risk Management
  - Real Estate Investment and Finance
  - The Design, Operation, and Maintenance of Building Systems, Part I
  - The Design, Operation, and Maintenance of Building Systems, Part II

### Facilities Management Administrator (FMA®)

- **Meet the FMA Experience Requirement**
- **Complete Additional Required Courses:**
  - Ethics Is Good Business ShortCourse
  - Facilities Planning and Project Management
  - Fundamentals of Facilities Management
  - The Design, Operation, and Maintenance of Building Systems, Part I
  - The Design, Operation, and Maintenance of Building Systems, Part II
- **Choose/Complete 1 Elective Course:**
  - Asset Management (elective option for RPA)
  - Real Estate Investment and Finance

### High-Performance Sustainable Buildings (BOMI-HP®)

Education for professionals responsible for the operation/maintenance of high-performance sustainable facilities.

- **Complete 3 Courses:**
  - High-Performance Sustainable Building Investments*
  - High-Performance Sustainable Building Practices*
  - High-Performance Sustainable Building Principles*





## ADDITIONAL EDUCATION OPPORTUNITIES

We realize that what you have learned on the job or at other educational institutions is valuable. Therefore, we offer options for obtaining credit for that experience.



Click [here](#) to access applications, the competency brochure, or to complete/submit a transfer of credit form. Canadian graduates, visit [www.bomicanada.com](http://www.bomicanada.com).

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### CREDITS

#### **Transfer Credits**

Credit for certain designation courses may be transferred between BOMI International's RPA, FMA, and SMA Designation Programs. There is no fee to transfer credits; however, there is an enrollment fee for the program you are transferring credits to (if you are not currently enrolled in that specific program).

Click [here](#) to view a transfer of credit application.

#### **Professional Credits**

The US Green Building Council (USGBC) has approved several BOMI International courses for GBCI CE Hours towards the LEED Credential Maintenance Program.

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### COMPETENCY

Graduates who pursue additional education opportunities may qualify for competency credit based on other education achievements.

#### **Administrative Competency**

An application process by which a student is given credit for specific courses from accredited colleges and universities, or from specific professional credentials, including the CCIM, CPM, CSM, PE, SIOR, and more.

Unless otherwise noted, students may receive competency credit for a maximum of three courses in the SMA Designation Program.

Please note all competency credit is awarded at the final discretion of BOMI International's Competency Committee.

# CPD INFORMATION AND REQUIREMENTS

The Continuing Professional Development (CPD) Program requires SMA Designation graduates to complete 18 points of continuing education credit every three years (the three-year renewal period begins on the date that graduates attain their first designation) in order to maintain their designation's active status.

Participation in the CPD Program helps graduates keep pace with the latest developments while enhancing their career and increasing the professionalism of the entire industry.

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## CPD FEES

Making a payment towards your CPD Program is an investment in your future. When you stay current with your CPD Program requirements, you are committing to your continued professional success. There are several options for making your CPD payment, including a reduced price if all three years are paid within 30 days of first invoice.

Click [here](#) for US CPD fees/information.

CN CPD fees/information: visit [www.bomicanada.ca](http://www.bomicanada.ca).

**In US, submit payment/documentation to:**

PO Box 829847  
Philadelphia, PA 19182  
Phone: 1.800.235.BOMI (2664) | Fax: 410.974.0544  
E-mail: [service@bomi.org](mailto:service@bomi.org)

**In CN, submit payment/documentation to:**

CPD Coordinator  
BOMI Education Canada  
Dept 400147, PO Box 4375 STN A  
Toronto ON M5W OJ3  
Phone: 647.251438 | 800.867.6049  
E-mail: [service@bomicanada.ca](mailto:service@bomicanada.ca)

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## Industry-Related Disciplines

CPD points can be earned through activities such as courses and seminars, real estate license renewal, and industry experiences/participation in the following Industry-Related Disciplines:

- Accounting
- Agency
- Anti-Terrorism
- Asset Management
- Auditorium Management/Maintenance
- Budgeting
- Building Maintenance Systems
- Civic Center Management/Maintenance
- Civil Engineering
- Commercial Property
- Construction
- Convention Center
- Disaster Preparation/Recovery
- Drafting/CAD Design
- Environmental Health and Safety
- Ethics
- Facilities
- Facility Management Systems
- Federal Laws and Regulations
- Finance
- General Management/Business
- Hospitality Industry
- Hospital Management/Maintenance
- Human Ecology
- Human Resources
- Management/Maintenance
- Marketing
- Mechanical Engineering
- Nature Sciences
- Project Management
- Property Insurance
- Real Estate
- Safety/Workplace
- Security
- Sustainability/Greenbuild
- Taxation
- Technology

Click [here](#) to access all of the forms you need to keep current with your CPD Program. Canadian graduates, visit [www.bomicanada.ca](http://www.bomicanada.ca).

Graduates must complete 18 points utilizing the options listed on the following page.

# OPTIONS FOR EARNING CPD POINTS

**OPTION 1: Real Estate License**—Fulfills all 18 CPD points. If you hold an active real estate license and complete continuing education to maintain it, you will receive CPD points.

**Verification Required:** Submit a copy of your real estate license.

**OPTION 2: Education Credit**—One CPD point awarded per classroom hour. If you successfully complete a course/seminar (including Instructor Workshops) with an authorized education provider, you will earn CPD points for each classroom hour, not including breaks, meals, etc. For courses with exam component required for successful completion, graduate must pass exam.

**Verification Required:** Provide a copy of course completion certificate; include your name, date(s) of course, course title, number of attendance hours, and exam score (if applicable).

Education providers include, but are not limited to:

- BOMI International
- BOMI International-Approved Providers
- BOMA International, BOMA Canada, and BOMA Locals
- Accredited Colleges and Universities

Note: You can also earn CPD points for completion of any seminar, workshop, or course on a topic included in the list of CPD Approved Disciplines.

**OPTION 3: Professional Accomplishments**—CPD points awarded as follows:

**Publications**—An article or research report published by a national industry journal. Two CPD points awarded per article, with a maximum of eight CPD points per three-year cycle.

**Verification Required:** Provide a copy of the original article indicating when and where it was published.

**Presentations**—Conference presentations on commercial property or related topic. Two CPD points awarded for each presentation hour; maximum of eight CPD points per three-year cycle.

**Verification Required:** Identify the conference name and the sponsoring organization. Provide a brief description of the topic, date/time, and the number of presentation hours.

**Instruction**—Teaching courses/seminars related to commercial property on topics included on the list of CPD Approved Disciplines. Two CPD points awarded for each hour of lecture. Credit may not be awarded for a specific course more than once per three-year cycle.

**Verification Required:** Indicate the class title, sponsoring organization, date(s) of class, and a copy of the class brochure with instructor's name and the lecture hours completed.

**Exam Author or Reviewer**—Serve as author, reviewer, or member of an exam development workshop for an approved provider. Two CPD points awarded per research/writing hour.

**Verification Required:** Submit confirmation from sponsor indicating the contribution, including the number of research and writing hours completed.

**BOMA Building Awards**—Participating as an active team member to submit a BOMA International, BOMA Canada, or Local Building Award(s). Six CPD points awarded.

**Verification Required:** Provide a copy of the application that indicates the sponsor, date, and building category.

**OPTION 4: Board/Committee Memberships**—Serve as a board/committee member for an organization related to commercial property, such as BOMI International, BOMA, IREM, IFMA, AEE, or ASHRAE (positions held at local, regional, national and/or international levels apply). Six CPD points awarded for each year you serve in each organization.

**Verification Required:** Include documentation, indicating your role and term of service, from the organization.

**OPTION 5: Association Memberships**—Maintain active membership in an industry association related to commercial property. Two CPD points awarded for each year of membership in each organization, with a maximum of six points per three-year cycle.

**Verification Required:** Include documentation, indicating your membership term, from the organization.





Facebook @BOMIInt  
LinkedIn @BOMI International  
Twitter @BOMIInt

Connect with BOMI International on social media to keep up with important graduate updates and CPD information.

## Who must meet the CPD requirement?

All RPA, FMA, and SMA graduates must meet the CPD requirement to maintain active status of their designation. If you do not fulfill the requirement by the end of your three-year cycle, your designation will be considered inactive.

If you are retired or no longer active in the profession, you do not need to meet the CPD requirement; however, please notify BOMI International so that we may mark your graduate record accordingly.

## If I hold more than one designation, will I have to earn more than 18 points over three years?

No. Dual and triple designees will be required to earn only 18 points during each three-year period.

## How do you determine when my three-year CPD cycle will begin?

Your CPD cycle is based on the month you receive your first BOMI International designation. If you received your designation in August 2012, your first CPD cycle will be August 2012-August 2015.

## What happens if I become inactive?

If you do not fulfill your requirement and become inactive, then you will need to pay a **Reactivation Fee**. Once this fee is received, a new active CPD cycle will be initiated.

## How will I know my CPD status?

It is your responsibility to keep accurate records of the activities in which you participate.

You will be notified of fulfillment of your CPD requirement once you submit your completed CPD Documentation Form, along with required documentation and full payment.

In addition, you will receive a CPD completion eCertificate via e-mail.

## What do I need to submit in order to verify my CPD points?

Please refer back to the Options for Earning CPD Points section of this packet.

## How often do I have to notify BOMI International of my CPD-related activities?

Once you have completed all 18 points, you may submit your CPD Documentation Form and supporting documentation. Please be sure to retain a copy for your records.

## How do I prove I have earned credit toward CPD?

You will need to complete a BOMI International CPD Documentation Form when you apply for credit. In addition, you will need to attach verification of all documented CPD points.

# CODE OF PROFESSIONAL ETHICS AND CONDUCT

## Preamble:

BOMI International, and its students and designees, are committed to promoting the highest level of professionalism, integrity, and ability available in the commercial property and asset management industry. This code of professional ethics and conduct is designed to foster trust and mutual respect among those working in the industry, as well as the public at large. It is not intended to discourage fair and healthy competition within the industry, but to increase the esteem of the designations and the individuals who earn them. We consider industry relationships critical to the industry's success.

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Minimum standards of conduct in these areas are contained herein:

**I. Professionalism**—Each student and designee of BOMI International shall conduct business in a manner displaying the highest degree of professional behavior, bringing credit to the profession, the industry, and BOMI International. Students and designees shall speak truthfully and act in accordance with accepted principles of honesty and integrity. They shall endeavor to understand and fairly represent his or her own scope of knowledge and ability to perform services.

**II. Responsibility to Clients**—Each student and designee shall diligently and honestly pursue the client's legitimate objectives. Whenever possible, objectives should be put in writing to avoid misunderstanding. No student or designee shall place his or her own needs and desires above those of the client in the performance of work for that client. Each student and designee shall advise the client regularly or as agreed on matters concerning the creation of value. National, State and Provincial, and Local (Municipal) laws as well as regulations, codes, and ordinances shall be strictly adhered to in the operation of property or equipment.

**III. Responsibility to Employers**—Each student and designee shall behave in a manner consistent with the stated goals of his or her firm and/or employer. No student or designee shall act out of a motive of personal gain apart from the knowledge and consent of the employer and/or firm.

**IV. Responsibilities to Real Property and Equipment**—Each student and designee shall be diligent in the operation of property to maximize its long-term value within the client's objectives. Students and designees shall not permit or cause damage to the property or properties under their control. In the operation of the property, students and designees shall take those actions reasonably necessary to maximize the security and life safety of the occupants consistent with accepted standards of the industry.

**V. Conflict of Interest**—Each student and designee shall fully disclose to the client any known conflict of interest between (a) the client; client's employees; suppliers; and other related parties, and (b) the owner; manager; or their employees arising prior to the engagement of management services. Each student and designee shall use every reasonable means to resolve such conflicts. No student or designee shall permit a conflict of interest to remain undisclosed, nor shall he or she create any appearance of impropriety.

**VI. Confidentiality**—Each student and designee shall maintain as confidential any legitimate business information provided in confidence until and unless given permission to disclose it by the source, or for the length of time that confidentiality is legally required.

**VII. Fair Dealing**—Each student and designee shall endeavor to deal fairly with his or her clients, tenants, competitors, vendors, employer, and employees. No student or designee shall take unfair advantage of anyone through manipulation, concealment, abuse of privileged information, misrepresentation of material facts, or any other unfair dealing practice.

**VIII. Records Management**—Each student and designee shall maintain complete and accurate records compiled in accordance with generally accepted procedures and provide them to the client or employer with comment on a regular basis. In addition, each student and designee shall control the funds and property entrusted to them in such a way as to protect the client and client's assets from any reasonably foreseeable losses.

**IX. Continuing Education**—Each designee shall endeavor to remain knowledgeable in the subject material of his or her designation by taking courses and seminars offered by BOMI International and others, reading industry periodicals, and consulting and sharing information within the industry network in the designee's area.

**X. Compliance with Laws**—Each student and designee shall comply with all National, State and Provincial, and Local (Municipal) laws and regulations, as well as any human rights statutes concerning the properties managed, appraising property owners as appropriate.