



# An Invitation to Qualify for a Select Group of Distinguished Professionals.

## Certified Director of Facilities Application





## The challenges have never been tougher. The need has never been greater.

Working together with teachers and school administrators, by managing facilities and maintenance departments, you make it possible for millions of students across the State to acquire the skills and knowledge they need.

Day to day, your job attracts little attention, earns little glory. But when new security systems are needed; the athletic field needs to be in top shape; or a school is undergoing renovation — the value of your contribution becomes instantly evident and your department becomes high profile.

It's a rapidly changing world. In your grandfather's day, small school houses were normal, and heat and light were the chief concerns. Today, you are likely to be in charge of a multi-building campus, and expected to specify, install and maintain systems that were unknown just a few years ago.

That's why you are invited to apply to the New York State School Facilities Association for the Certified Director of Facilities (CDF) Program.

*"I obtained my Certified Director of Facilities designation in 2018 with the encouragement and mentorship from the leaders of the Southern Fingerlakes Chapter. It's a great way as a facilities director to reflect on your career and realize what you have to offer for our schools and the people we serve. It was well worth the time and effort to accomplish the accreditation."*

- Joe Pollinger, CDF, Arkport CSD

## What does the CDF Program do?

The CDF Program certifies that you are a professional, who is:

- Fully qualified and competent to handle the duties and responsibilities of your profession.
- Continually upgrading skills to match the latest school systems and procedures.
- Committed to a Code of Ethics insuring the highest level of personal and professional conduct.

For you, the CDF Program will:

- Provide verification of your knowledge and skills, proof that you are one of the best of the best.
- Open doors of opportunity.
- Offer a path to professional knowledge, growth and recognition.
- Provide opportunity to network among peers who have achieved certification and will serve as valuable career contacts.
- Offer opportunity for greater earning potential and career advancement.

## Who is eligible for the CDF Program?

You are eligible to apply for the CDF Program if:

- You are a paid active member in good standing of NYSSFA.
- You have five or more years of experience in the operation and/or maintenance of educational facilities.
- You are currently employed full-time by an educational facility in the State of New York as a Director of Facilities as defined in organizational bylaws.
- You pledge to adhere to the Certified Director of Facilities Code of Ethics.
- You demonstrate knowledge in, and the ability to apply, the professional skills in five core competencies in the management of educational facilities:
  1. Management of Personnel in Facility Operations
  2. Technical Systems in School Facility Operations
  3. Principles of School Facility Management
  4. Codes, Standards, Administrative and Legal Rules
  5. Environmental and Occupational Safety and Health

If you are not currently eligible, now is the time to learn about the CDF certification requirements so you can take the necessary steps toward achieving your certification.

## Registered Director of Facilities (RDF\*)

If you have not worked five years in the operation and maintenance of educational facilities but you meet all the other requirements, you can obtain your Registered Director of Facilities (RDF) certificate. Then, at your fifth anniversary of working as a director of school facilities, you will receive your CDF.

*“The CDF program provides directors of facilities with a personal checklist to ensure that we’re equipped to serve the needs of students, staff and community in an ever-changing profession. It also allows professionals the ability to communicate related experience and how it aligns with expectations and responsibilities. Schools have become very demanding customer service and safety-driven environments; to navigate successfully, we need to continually enhance our knowledge, resources and creative thinking abilities. The CDF program is a great way to support and fulfill this purpose.”*

- Keith Watkins, CDF, City School District of New Rochelle

## What are the steps involved in earning the CDF Certification?

### Step One

Complete and return the accompanying application together with the non-refundable fee. When your application is received, Association headquarters will send you instructions on how to complete your Personal Data Portfolio (PDP) and how to proceed with completing the balance of the certification process. A list of CDF mentors will be provided for your use.

## Step Two

Complete the PDP. The PDP is designed to help the Certification Committee evaluate your qualifications in five key areas:

1. Management of Personnel in Facility Operations
2. Technical Systems in School Facility Operations
3. Principles of School Facility Management
4. Codes, Standards, Administrative and Legal Rules
5. Environmental and Occupational Safety and Health

A description of the major technical and management skills that fall under these core competencies is provided on page 6.

There are two ways which you can demonstrate your qualifications:

1. Documented Work Experience. This information must be submitted in chronological narrative form. It shall provide in-depth information on the nature and depth of your experience as it relates to the technical competency required for certification. It must be accompanied by appropriate affidavit(s) from person(s) familiar with the experience submitted. Affidavits shall be accompanied by the name, title, address and telephone number of the person(s) signing the affidavit. Candidates shall advise the affidavit signer that they may be contacted for confirmation of information submitted. If you submit Documented Work Experience for evaluation and credit, you will be advised of the areas of technical competence for which they will receive credit.
2. Educational Experience. This information is to be submitted by listing the schools and colleges you attended, years attended, programs of study, diplomas and degrees obtained. In addition, you shall provide for the forwarding of all applicable transcripts directly from the educational institution to SFMI at 136 Everett Road, Albany, NY 12205.

All applicants must submit a Personal Data Portfolio (PDP) no later than June 30 of the following year. The PDP is essential to obtain maximum credit for learning experience pertinent to the technical competencies required for certification.

Take your time in preparation of your Personal Data Portfolio (PDP) since the more detailed you are, the more credit you will receive. Applicants should review the experience portion of their application toward obtaining specific credit, as appropriate, for the technical competencies. Prepare narrative descriptions of the various relevant work experiences, keeping the descriptions in the same chronological order as the application. These descriptions should be well-detailed. They should be written so that the examiner gets a full description of the work and its detailed relevancy to the various technical competencies required for certification. Use additional sheets when detailed descriptions are used and identify them by section number on the application.

The PDP is reviewed by the CDF Committee to assure that the applicant has met the basic criteria outlined above. If acceptable, the PDP is sent for an independent review and "scoring" of the PDP. The PDP is scored based on how well the competencies are met. The CDF Chairman will notify CDF applicants whether or not they qualify for the exam and when the exam will be given. A minimum score of 70% is necessary to be accepted as a qualified candidate.

## Step Three

The next step in the process is an examination designed to measure your knowledge of facilities management. Consisting of multiple choice, essay and oral portions, this examination is administered once a year at the annual conference.

The final step is an interview with the CDF Committee, a problem-solving interaction scenario similar to a job interview. Through this process, the committee examines the candidate's ability to respond to situations an experienced facilities director may face.

If you have successfully completed all portions of the certification process, you will receive your certificate, pin and credentials at the annual banquet, and you will be privileged to join the select few who have earned the designation, "Certified Director of Facilities."

*The CDF program is a wonderful vehicle to increase the level of knowledge and skills utilized by all school facilities managers."*

- Peter Riggi, CDF, Schuylerville CSD

## The Exam Process

The PDP must be received by June 30, reviewed by the CDF Committee, and reviewed and approved by the Building Operators and Managers Association (BOMA) before an applicant may sit for the CDF exam. The exam is given annually at the New York State School Facilities Managers' annual convention held in September or October of each year. It focuses on the technical and managerial competencies summarized on page 6. The test consists of 50 multiple-choice questions, three essay questions, and an oral exam. It is graded at the conference, and a passing grade of 70% in each section of the exam is required.

## CDF Mentor Program

Association members who have received their CDF serve as mentors to candidates seeking certification. Each candidate receives a list of mentors in his or her Chapter. Mentors are available to answer questions about the PDP, the exam and any other questions about the CDF program. It is up to the candidate to contact a mentor for assistance.

## How the Program is Administered

The NYSSFA Executive Board has appointed a Chairman of the SFMI Accreditation Committee. The committee Chairman selects committee members, who are certified, to administer the CDF program, set policy and assure that the program reflects the changing needs of the profession. In addition, the CDF Committee hears any appeals made by the CDF candidate involving the certification process. All information you provided is kept strictly confidential.





In partnership with



NEW YORK STATE  
SCHOOL FACILITIES ASSOCIATION

## Technical Competencies

The technical competencies required to obtain the CDF designation fall into five main categories:

1. Personnel management in facility operations
2. Technical systems in school facility operations
3. Principles of school facility management
4. Codes, standards, administrative and legal rules for facilities managers
5. Environmental and occupational safety and health

What follows is a general description of the major competencies that fall under the five categories described above. Other associated subjects may apply to each competency.

### Personnel Management Facility Operations

- Human relations management of principles of human value systems, behavior, needs, motivation, behavior modification.
- Verbal and written communications, body language perceptions, methods, feedback.
- Organizational management, organizational functions, group behavior, social behavior and constraints, work qualifications, principles of power and authority.
- Trade knowledge facility in construction trades, their job descriptions, the knowledge base requirements of each trade, job relationships.
- Education and training, educational outcomes, goals and objectives, lesson plans, outcome measurements.

### Technical Systems School Facility Operations

- Architectural systems, masonry, fireproofing, metals, carpentry, moisture protection, insulation, roofing, siding, windows, glass, finishes, space requirements and utilization.
- Civil, structural systems, site work, piles and foundations, demolition, excavation and backfill, site drainage and sanitary sewers, fencing, roads and walks, reinforced concrete, structural steel.
- Mechanical systems, piping systems, hangers and supports, valves, control devices, insulation, sheet metal work, piping identification, plumbing fixtures and trim, special piping systems, heating, ventilation and air conditioning systems, heat transfer equipment, refrigeration, combustion, control systems, site work, testing.
- Fire protection systems, stand pipes, fixed systems, inert gas systems, sprinkler systems, building materials, fire zoning, ventilation control, testing, national fire codes.
- Electrical systems, main and distribution systems, feeders, motors, controllers, telephone systems, fire alarm systems, smoke detection systems, emergency equipment, communications systems, NFPA# 70, testing.
- Energy conservation, heat transfer, combustion efficiency, power factor, fluid dynamics, management control, solar energy/wind/geothermal, control systems, maintenance of energy systems.
- Site systems, grounds maintenance, landscaping, grading, roads, parking lots, outside stairways, outside lighting, drainage, site structures, site work, equipment.
- Security systems, laws and techniques required for security operations at industrial, public, and mercantile establishments. Crime prevention principles and equipment necessary for the protection of personnel and property.
- Transportation systems, vehicle capitalization, maintenance, operations, routing, legal requirements, safety operations, driver qualifications.

## Principles of School Facility Management

- Blueprint reading, architectural, civil/structural, mechanical, electrical drawings, graphs, model building, other methods of presenting technical concepts.
- Principles of measurement: application of mathematics to technical problems. Included are volumes, area, hydraulics, mechanical devices, heat transfer, electricity, lighting, business, structures.
- Managerial accounting, financial statements, income determination, account classification, charter accounts, inventories and their evaluation.
- Budgeting: revenue, operational course projections, capital maintenance, capital improvements, equipment and tools, fuels, expendable supplies.
- Project Management: Project coordination, understanding project budget, liaison between contractors/vendors and administration
- Material purchasing, handling and storage specifications, vendor qualifications, vendor selection, shipping considerations, material handling, warehousing, inventory control, maintenance of materials, cooperative purchasing, equipment and the storage facility.
- Estimating use of plans, specifications, and other technical documents, material bills, labor productivity, maintenance requirements of materials and labor, cost related, burden and other associated subjects.
- Production management, production process, criteria, analysis, labor productivity planning, scheduling of manpower, material, money, equipment for overall and individual facility operations or maintenance.
- Facility maintenance systems, physical plant inventory, manufacturer maintenance and operations instructions, preventive maintenance, inspections, tests, labor productivity and other associated subjects.
- Computer literacy, selection of data processing systems, operating systems, facility operations software programs, data banks, basic programming.



## Codes, Standards, Administrative and Legal Rules

- Codes, standards and administrative rules, facility code process, specific relevant codes and the agencies creating them, standards for the construction, operations and maintenance of facilities, administrative rules established by employer and senior authority having jurisdictions.
- Real property contracts, laws affecting real property and their improvements, surveys, construction documents, mechanic liens, judgments, arbitration, property encumbrances, claims.
- Judicial process, administrative agencies and process, common law, Sherman Antitrust Law, New York education laws, labor laws, ethics and morality.
- Insurance for vendors liability, property damage, Worker's Compensation, bonds (performance, completion in payment), vehicular.

## Environmental and Occupational Safety & Health

- Environmental Safety and Health USCFR Section 40, environmental considerations that effect human and animal life through contamination of their vital support systems (ie. air, water, earth, weather, food, combustion, asbestos, site dumping, industrial processing.)
- Occupational Safety and Health USCFR Section 29, occupational safety and health considerations for employment environment. Management responsibilities, organization, training, inspections, use of hazardous substances.

## Certified Director of Facilities (CDF)

### Code of Ethics

- I will recognize that management is a call to service with responsibilities to my subordinates, associates, supervisors, employer, community, nation and world.
- I will be guided in all my activities by truth, fair dealings and good taste.
- I will earn and carefully guard my reputation for good moral character and citizenship.
- I will recognize that, as a leader, my own pattern of work and life will exert more influence on my subordinates than what I say or write.
- I will give the same consideration to the rights and interests of others that I ask for myself.
- I will maintain a broad and balanced outlook and will look for value in the ideas and opinions of others.
- I will regard my role as a manager as an obligation to help subordinates and associates achieve personal and professional fulfillment.
- I will keep informed on the latest techniques, equipment and processes associated with the practice of management and the facility in which I am employed.
- I will search for, recommend and initiate methods to increase productivity and efficiency.
- I will respect the professional competence of my colleagues in the CDF Program and will work with them to support and promote the goals and programs of the Association.
- I will support efforts to strengthen professional management through example, education, training and a lifelong pursuit of excellence.

The following are accomplishments that qualify for the point accumulation system. Remember, a total of 600 points is required.

Requirement	Points	Required	Minimum/Maximum
State Conference	5	Yes	1 conference required/ maximum 30 points
Seminars	6/day		Facilities-related/maximum 54 points
SFMI Courses	10/day	Yes	Minimum 2 courses/no maximum points
B.O.C. or Equivalent	6/day		Maximum 50 points
Portfolio	90	Yes	Minimum 67 points
Leadership	2		Per office held per year/maximum 10 points
MVCC	25		3-hour course (must be required in FM Syllabus)
Other College	25		3-hour course (must be required in FM Syllabus)
BOCES Training	6/day		Maximum 30 points
Vendor Training	4/day		Maximum 20 points
NYS Codes Enforcement	50		
NYS Pesticide	25		
NYS Asbestos	25		
Certified Pool Operator	25		
Other Certifications (facilities related)	6/day		Maximum 25 points
Oral Examination	25	Yes	Minimum score of 18 points
Presenter/Speaker	10		Maximum 30 points
2 Day Facility Academy	100	Yes	
Written Examination	100	Yes	Minimum score of 70 points
Total	Must Achieve 600 points		







## Certified Director of Facilities

School Facilities Management Institute, Inc.

136 Everett Road, Albany, NY 12205

Telephone: 518.465.0563 / 800.359.7242 • Fax: 518.465.0579

[sfmi@nyssfai.com](mailto:sfmi@nyssfai.com) • [nyssfai.org](http://nyssfai.org)



In partnership with



NEW YORK STATE  
SCHOOL FACILITIES ASSOCIATION

# Certification Application (please print or type)

---

Name \_\_\_\_\_ Title \_\_\_\_\_

---

School District \_\_\_\_\_

---

Office Address \_\_\_\_\_

---

City \_\_\_\_\_ State \_\_\_\_\_ Zip+4 \_\_\_\_\_

---

Office Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

---

Home Address \_\_\_\_\_

---

City \_\_\_\_\_ State \_\_\_\_\_ Zip+4 \_\_\_\_\_

---

Home Phone \_\_\_\_\_ Social Security # \_\_\_\_\_

---

Chapter Affiliation, # of years in association \_\_\_\_\_

I have been in a school facilities management position for \_\_\_\_\_ years. From \_\_\_\_\_ To \_\_\_\_\_

In making this application, I fully understand that it is for enrollment purposes only in order to complete registration. I will execute the necessary documents, submit to oral and written examinations and supply further information as determined by the NYS SFA Certification Committee. I further understand and, by my signature, subscribe to the NYS SFA Code of Ethics with the knowledge that any false statement or misrepresentation that I may make in the course of these proceedings, may result in the revocation of this application and issuance of a complaint of violation on said Standards.

---

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

**NYS SFA CANNOT BILL YOU. ALL FEES MUST ACCOMPANY APPLICATION.**

Non-refundable application fee is \$250.00 for all Active members in good standing of the Association.

Send completed application with payment to:

NYS SFA Certification Committee | 136 Everett Road, Albany, NY 12205.

Total amount enclosed: \$ \_\_\_\_\_

Paid by check or Purchase Order

---

Date \_\_\_\_\_ Check # \_\_\_\_\_

Charge my:  Visa  Mastercard  Amex  Discover

---

Account # \_\_\_\_\_ Expires \_\_\_\_\_ Security Code \_\_\_\_\_

---

Billing Address \_\_\_\_\_

---

Signature \_\_\_\_\_ Date \_\_\_\_\_