



North American Transportation Management Institute

General Information, Reference letter templates

- ◆ Director of Safety, CDS
- ◆ Safety Supervisor, CSS
- ◆ Director of Equipment and/or Maintenance, CDM/E
- ◆ Maintenance Supervisor, CSM/E
- ◆ Trainer of Commercial Drivers, CDT

Certification Program Guide

Introduction

*Congratulations on making a
decision to advance your
career through professional
certification!
— The Certification Board*

About This Guide

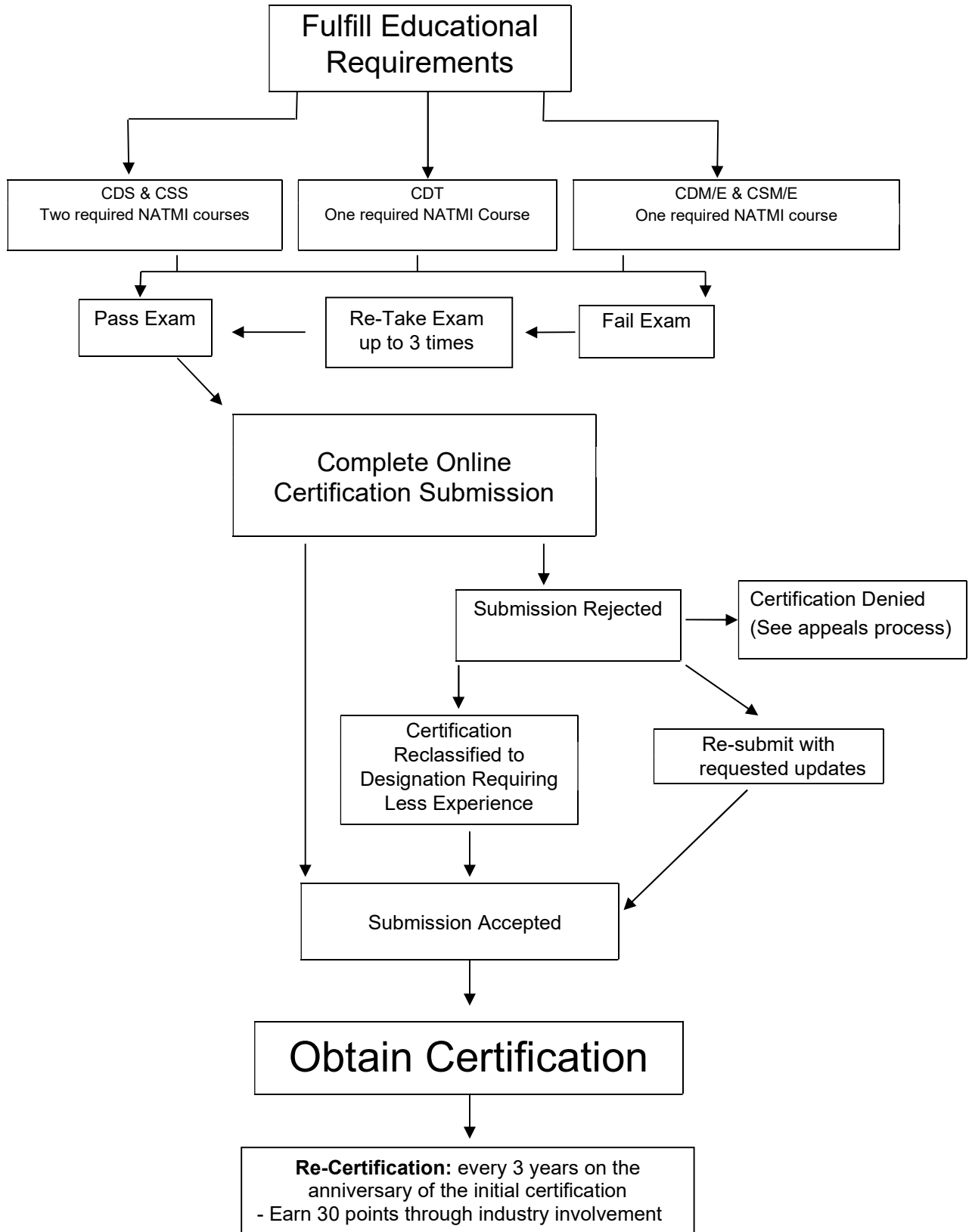
Thank you for your interest in becoming a certified transportation professional through the North American Transportation Management Institute (NATMI). This guide contains all of the information that you will need to successfully complete your certification process. In it you will find the following items:

- √ General information on the NATMI and its programs;
- √ The steps to certification for each professional designation;
- √ How to complete the steps for certification;
- √ Commonly asked certification questions;
- √ Checklist of items that must be submitted in the exhibit package;

In your pursuit of NATMI certification, we advise you to **find and utilize a Certification Mentor**. Mentors are NATMI-certified individuals who can assist you in developing a successful certification application. Applicants utilizing mentors are far more likely to have their application approved. To obtain a mentor, contact the NATMI staff at (303) 952-4013 or email info@natmi.org.

The Certification Board measures candidates based on their experience, education, and expertise. Fleet operators look to us to provide uniform, professional standards and evidence of expertise in job performance in the area of professional status earned through certification. By adhering to our recommended practices, certified professionals are assured a uniform foundation of competence throughout the industry. The Board and the staff of NATMI are here to encourage you in your goal to become certified. All applicants are welcome to call the NATMI offices at (303) 952-4013 for further information or assistance.

Certification Process



NATMI Certification

NATMI MEMBERSHIP

The North American Transportation Management Institute (NATMI) has been educating transportation management professionals since 1944 and providing certification designations since 1955. The NATMI certification program is the only one of its kind that is internationally recognized. NATMI works in conjunction with its accrediting university to offer courses, issue Continuing Education Credits, and supervise the certification process for all applicants. NATMI-sponsored courses, usually delivered through state and provincial trucking associations, enable managers to keep up with new technology and management practices necessary to run successful fleet operations. Members represent all facets of the motor transportation industry including safety, driver training and maintenance professionals, industry associations, insurance companies and government agencies.

Membership in NATMI offers:

- Greater Professional Advancement through certification;
- Discounts on course fees
- Internationally-recognized professional achievement;
- Continuing Education Units from a national university;
- Access to updated professional training;

- A special discounted rate for members taking courses;
- The *Motor Fleet Monthly* newsletter.
- Involvement in the development of new industry training trends;
- A mentor program to guide certification applicants; and
- The NATMI online Membership Directory.

Membership in NATMI is by individual and not by company. For companies with more than one employee serving as a member in good standing, a discount is given for additional memberships.

THE CERTIFICATION PROCESS

The goal of certification is to designate competence regarding the transportation industry's standards of performance, excellence, and achievement. Attaining certification offers many advantages to individuals interested in career advancement. Anyone pursuing a job promotion or employment with a new firm will find the credential important. The NATMI office maintains an up-to-date list of those achieving certification to provide verification for the many calls it receives from employers and attorneys. NATMI certification is also recognized nationally by judges and attorneys in matters of testimony about motor fleet accidents.

What Are the Steps that Lead to Certification?

4 Steps to Certification

1. Meet the experience requirements,
2. Complete the required seminars,
3. Pass certification examination, and
4. Complete online certification submission

Safety Director (CDS)

Course Requirements:

- Motor Fleet Safety Basics
- Managing Motor Fleet Safety Programs

Experience

- Five years in the safety field or,
- Four years in the safety field with a 4-year college degree or 5 years of CMV Enforcement experience, provided the experience included auditing and training.

Expertise

- Candidates must serve as full-time administrators demonstrating their capability of handling a position which involves establishing programs and policies, setting standards, developing materials, and providing leadership to achieve the goals set.

Safety Supervisor (CSS)

Course Requirements:

- Motor Fleet Safety Basics
- Managing Motor Fleet Safety Programs

Experience:

- Two years in the safety field

Expertise:

- Certification is awarded to those supervisors who can carry out policy and program directives. Supervisors are expected to implement programs, provide leadership, and assist in the development of programs and materials within limitations established by their managers.

Trainer of Commercial Drivers (CDT)

Course Requirements:

- Essential Instructional Skills for Professional Driver Trainers

Experience:

- Two years in the training field

Expertise:

- Certification is awarded for those individuals who demonstrate the ability to conduct driver training programs and carry out responsibilities assigned by their management.

Director of Maintenance/Equipment (CDM/E)

Course Requirements:

- Essentials of Fleet Maintenance Management

Experience

- Five years in the maintenance field or,
- Four years with a four-year college degree

Expertise

- Candidates must serve as full-time administrators demonstrating their capability of handling a position which involves establishing programs, policies, setting standards, developing materials, and providing leadership to achieve the goals set.

Maintenance Supervisor (CSM/E)

Course Requirements:

- Essentials of Fleet Maintenance Management

Experience:

- Two years in the maintenance field

Expertise

- Certification is awarded to those supervisors who can carry out policy and program directives. Supervisors are expected to implement programs, provide leadership, and assist in the development of programs and materials within limitations established by their managers.

Completing the Steps to Certification

Registration

To get started with certification, the first step is to register for the required course(s), which are offered in multiple locations throughout the US and Canada, usually hosted by state or provincial trucking associations. Registration fees must be paid in advance. Course registration, certification and one year's membership fees are all-inclusive in the total certification program registration fee.

University continuing education certificates will be provided to attendees after the course(s). The online exam is taken onsite immediately following the courses and the test result will be available in your online Learning Center immediately following the completion of the exam.

Experience

All certification designations have a minimum level of required experience. The Certified Director of Safety (CDS) and Certified Director of Maintenance/Equipment (CDM/E) designations, for example, have a 5-year experience requirement (or 4 years with certain stipulations). The Supervisor of Safety (CSS) or Maintenance/Equipment (CSM/E), as well as the driver trainer (CDT) designation, have a 2-year experience requirement.

Courses are valid for up to 5 years. A student may take the courses at any time, regardless of whether they meet the experience requirement, and apply for a designation once they have attained the minimum experience required.

Certification Exam

The exam is taken through your online Learning Center. Typically, the exam will be administered on-site immediately following the training program. If you are unable to take the test onsite or must retake the exam, online testing that is proctored virtually or in person can be arranged.

Each certification category has a separate exam which can consist of multiple choice and true-false questions. The required course(s) for each certification will prepare applicants for the exam through course content, which may include end-of-unit quizzes.

Online Certification Submission

If you meet the experience requirement, have completed the courses, and passed the exam, in your Learning Center, you'll complete an online certification application by uploading PDF documents.

The online submission is intended to measure an applicant's skill in job performance. The steps indicated in this guidebook will provide the Certification Committee members a profile of your experience and expertise. Your submission is saved in your Learning Center and be accessible to you at any time.

You do not need to complete the online submission in one session. You can save your progress and return to complete the process at any time. Several documents must be uploaded, which demonstrate your background, experience and – most importantly – your job performance.

If questions arise at any time during this process, please call the NATMI staff at (303) 952-4013.

Commonly Asked Certification Questions

1. Who should I have fill out my recommendation letters?

Letters of recommendation should be completed by people who can vouch for the quality of work and leadership of the applicant, the first being the applicant's supervisor. Reference letters from work colleagues outside of your company can come from such individuals as insurers, suppliers, peers, and transportation association representatives.

2. What types of questions are on the certification exam?

Each certification exam differs in the exact make-up of questions. Candidates can expect 100 questions, which are a mix of multiple choice and true-false.

3. Where does the Committee place the most emphasis (test or online submission)?

The Certification Board places the greatest emphasis on a candidate's expertise as reflected in the online application. Your record of expertise should always show both knowledge and skill. In addition, your job responsibilities should be appropriate to the level of professional certification sought.

4. How long should it take until I hear something?

The certification process varies by candidate. If your application is not complete or is submitted incorrectly, the certification process will not move forward. You will be informed of which sections were deficient with a request that the deficiencies be remedied by submitting missing or correcting incorrect information.

The Certification Board will review and make a recommendation on an applicant's certification within two to four weeks of when all materials have been submitted online.

5. What if my exhibit is rejected?

When an exhibit is rejected, the reviewers note what sections are incomplete or inadequate to demonstrate the level of experience or expertise necessary for the certification. The candidate may then resubmit the deficient sections of the exhibit with further documentation. Generally, applicant's resubmitted exhibits are approved if adequate information is provided after the initial rejection.

In some cases, the applicant is not qualified for the level of certification sought (e.g., Safety Director) and the certification Board may recommend that the candidate accept a level of certification that requires less experience (e.g., Safety Supervisor), in which case the exhibit will be approved. Or the candidate may resubmit the exhibit with further information demonstrating the experience level sought in the initial application.

6. Do I have to wait until I am in the profession 2-5 years before I can even start the certification process?

No. Any applicant may begin the certification process before he or she reaches the experience requirement. The required courses may be taken before the experience requirement has been met since the course certificates are valid for up to five years.

7. Can similar courses taken through other organizations be substituted for the required NATMI courses?

No, for two reasons. A significant part of the exam is based on the content of the NATMI sponsored courses. In addition, the university will not recognize courses not approved for Continuing Education Units through its continuing education division, since adequate judgment cannot be made as to course content or quality.

8. What would you recommend as the best way to get started?

*The best way to ensure success is to register for an upcoming certification program via the NATMI website at www.natmi.org. Next, **contact a Certification Mentor**, someone who is certified and knows how to complete the process successfully the first time (see the following page for further information). NATMI maintains a list of mentors on its website, and you may also contact the staff at (303) 952-4013.*

9. Is there a certification renewal requirement?

Yes. Renewal is based on a point system and must be completed by the 3-year anniversary of your initial certification. You must earn 30 points during the three-year timespan. Points can be earned through a wide variety of industry volunteer and professional development activities at the local, regional, and national levels.

Certification Mentor Program

Who can Become a Mentor?

Anyone who has successfully completed the certification process can become a mentor. Many mentors are individuals who have been involved as a volunteer for NATMI. Although being involved as a volunteer committee member or leader is not a prerequisite for mentors, it is recommended since volunteers have the best understanding of NATMI's programs, policies, and goals as an organization.

What do mentors do?

Mentors help certification applicants, usually individuals in their local area, by advising them on the proper presentation of their professional accomplishments in their online submission. Mentors may also provide guidance on how to prepare for the certification examination, explaining the format of the exam and the types of questions asked, as well as which reading materials and what sections of those materials should be focused upon. Obviously, mentors can't give applicants the answers to the test, but they can at least tell them what to expect.

Mentors may meet one-on-one with the applicant in-person or virtually or discuss the process by phone. It is recommended that mentors review an applicant's documentation before it is submitted online. This way, the mentor may spot areas of the submission that the applicant has left incomplete, missing, or completed improperly. This provides a means of pre-screening the submission, which saves both the applicant and the Certification Board the time and effort associated with possible rejection and resubmission of the exhibit with changes.

How do I Find a Mentor?

After you have registered for a certification program, you can visit the NATMI website at www.natmi.org and search online for a mentor near you. Also, if you know of a NATMI certified individual in your area, you may simply ask them to assist you in putting together your online submission.

Mentors may also announce at their local State or Provincial Trucking Association meeting that they are available to potential applicants in search of guidance. We encourage Mentors to "create their own business" by promoting certification on the local level.

Also, feel free to contact the NATMI staff at (303) 952-4013 and ask to be provided with names of potential mentors.

Online Submission Items Overview

- Formal Education
- Professional Development
- Reference Letters
- Memberships
- Employer History
- Organizational Chart
- Policy Statement
- Job Description
- Employment Verification
- Management Activities
- General Workplace Information
- Performance Data
- Attestation Statement

Online Submission Items Detail

When you complete the application in your online Learning Center, the documents should be uploaded in PDF format. Within a section, if multiple items are requested, all items should be merged into a single PDF.

Applicants must follow the guidelines verbatim. The entire application will be put on hold and process delayed if any required signature/date is missing. The same is true if the required number of examples are not provided, or data is not submitted for the entire timeframe requested. To avoid delays, do not submit the application until you have verified that all documents are submitted precisely as requested.

1. **Formal Education:** detail your formal education, noting highest level of education attained, including name and address of last school attended.

Director-level applicants wishing to reduce the number of years of required experience from 5 years to 4 years must upload a college transcript or diploma. If you are not a director-level applicant or do not wish to reduce the experience requirement, you DO NOT need to upload your transcript.

2. **Professional Development:** In this section you must provide proof of professional development (certificate, receipt) for non-NATMI courses taken in the past five years. Minimum of 1, Maximum of 3.
3. **Three reference letters:** Using NATMI's standard Letter of Reference Form, two of three reference letters must be submitted from work colleagues outside of your company (e.g., suppliers, insurers, peers). One of three reference letters must be submitted by your employer. All letters of reference must be signed and dated by the person providing the reference. Unsigned, undated references will not be accepted.
4. **Memberships:** provide proof of membership (membership card, paid invoice, etc) in any local, state/provincial, or national professional or trade associations, councils or clubs. Minimum of 1, Maximum of 3.
5. **Employer History:** provide employment data for the last 10 years at a Maximum of 3 employers. If you changed positions at the same company, please specify timeframes you held a specific job role (e.g., safety coordinator from x date - y date, safety manager from y date to z date).
6. **A workplace organization chart** showing a) your position, b) the names of your supervisors and c) your relationship to top management and subordinates. The chart must demonstrate that you are in the role for which you are seeking certification.
7. **A management policy statement** – provide a management policy statement or other employer directive under which you and your department function. The statement must be signed by a member of upper management. An unsigned statement will not be accepted.
8. **Job description**, which must be signed and dated by a member of upper management. This must outline a) duties and responsibilities, b) authority and c) relationship between your job and other employees and supervisors and d) any other criteria to show what your job involves. If you perform supervisor/manager-level duties, but your job description does not indicate this, you must include a signed letter from upper management or Human Resources

verifying that you have management responsibility within the company.

9. **Verification of employment**, such as a statement from your employer confirming your job title and current employment status, which must be signed and dated by a representative of upper management or Human Resources and must include the verifying manager's job title. Unsigned/undated documents will not be accepted.

10. **Management Activities**: illustrate a minimum of four management activities in which you have participated or for which you were responsible. This section could include a) procedures that you have authored, b) memos, c) directives or d) notices. Provide detail to permit the board to understand the activities, how they operate and your role in them. This material should illustrate the programs that you are responsible for initiating or implementing, your authority when it comes to these programs and how they progressed. Actual documents (memos, etc.) rather than summary descriptions of activities must be submitted. **Certified Driver Trainer (CDT) Applicants can provide** a) Examples of training tools candidate developed/enhanced, b) lesson plan(s) candidate developed, c) driving range plans, d) examples of student assignments, e) performance reports, f) curriculum development/delivery information, g) training techniques candidate put in place.

11. **General workplace information.**
 - a. **The size of your company.** This includes a) the total number of employees, b) fleet size and c) the number of employees that you supervise.
 - b. A description of the **company's primary transportation role**, or other fleet-related activities the company is involved in.

 - c. **Insurance/consultant applicants** should provide information regarding the fleets that they are directly responsible for, including a synopsis that lists fleet size, primary description of fleet (tank, van, reefer, bus, etc.) and primary cargo hauled. How many have a full-time safety director? How many do you visit on-site and how often?

Describe in detail your responsibilities to the insured/customer fleets. The submission should give the certification board a full understanding of the size and scope of your responsibilities.

12. Performance Data

Performance data must be submitted for the timeframe of experience required for certification. Thus, for the Certified Safety Supervisor (CSS), Certified Supervisor of Maintenance/Equipment (CSM/E) and the Certified Driver Trainer (CDT) two (2) years of job performance data must be provided. For the Certified Director of Safety (CDS) and Certified Director Maintenance/Equipment (CDM/E) either five (5) years – or four (4) years if the candidate has a 4-year college degree – of job performance data must be provided. *

Director Level Applicants (CDS and CDM/E): List all facts on the **effectiveness of your job performance**. This could include a) frequency rates, (b) breakdown rates, (c) cost effectiveness, (d) reduced downtime, (e) budget savings, (f) programs sponsored, (g) increased efficiency (h) account services (i) improved student performance (j) improved training program content/delivery or (k) new program development. Specific performance data (spreadsheets, graphs, reports, etc.) demonstrating improvement over time, not a vague description of safety initiatives, must be submitted.

Supervisor Level Applicants (CSS, CSM/E or CDT): Company Employee Evaluation is acceptable, so long as the evaluation is based on specific performance measures and the candidate's evaluation rated work performance in the upper level, not lowest satisfactory level. For CDT applicants, data on student pass rates (i.e., do you have higher than average pass rates and/or higher exam scores than the school norm) can be provided. Candidates can also provide examples of ideas or suggestions they formulated to improve company/department operations, which were implemented by management (email or memo from management required to confirm validity). Also, if available, any data listed above for "Director Level Applicants" is encouraged to be submitted.

Insurance/consulting applicants should show specific results achieved from implementation of specific recommendations and/or programs and procedures designed by the applicant. Effectiveness of the programs should not be limited to, but should include, providing five-year accident frequency/severity data for your insured/clients.

The data should include comparisons or show a relationship demonstrating personal effectiveness. Letters from the insured/client should substantiate recommendations and verify improvements noted.

Special achievements (optional proof of performance) – Maximum of 3. Examples can be in the form of a copy of the award, newspaper or journal clipping, or the title page of a paper or article.

Internal recognition (optional proof of performance) awards or letters. This includes memos or letters which demonstrate your effectiveness within the organization. Internal awards and letters from management may be included. Please limit this section to 2 awards

**If part of the candidate's 4- to 5-year CDS or CDM/E experience was with a previous employer who won't allow access to data, a minimum of 3 years of actual data is required to be provided. If a previous employer refuses to provide data beyond the 3-year requirement, the applicant may provide a written description (vs. actual data) of performance outcomes for the two years at the previous employer, so long as a representative of the previous employer signs off on the description as true and accurate.*

13. **Attestation Statement:** applicant certifies that the statements and documents provided are true and correct and authorizes the Certification Board to verify any information submitted.

Letter of Reference Form

To the Certification Candidate:

1. **Distribute three (3) copies of this form or email an electronic version** to obtain three letters of recommendation -- one from your supervisor and two from work colleagues outside your company.
2. Ask these individuals to complete this reference form and return it to you.
3. Assure both sides are completed, and the letter is signed and dated.
4. Upload copies of the letters in your online submission.

To The Reference Person

The certification applicant has requested that you provide a Letter of Reference to the Certification Board of the North American Transportation Management Institute (NATMI).

Candidate Applying for Certification:

Name:

Company:

City, State/Province:

Certification category applied for:

- | | |
|--|--|
| <input type="checkbox"/> Certified Director of Safety (CDS) | <input type="checkbox"/> Certified Safety Supervisor (CSS) |
| <input type="checkbox"/> Certified Director of Maintenance/Equipment (CDM/E) | <input type="checkbox"/> Certified Supervisor of Maintenance/Equipment (CSM/E) |
| <input type="checkbox"/> Certified Driver Trainer (CDT) | <input type="checkbox"/> Certified Cargo Security Professional (CCSP) |

Reference Person for Candidate:

Name:

Title:

Company Name:

Company Address:

Telephone No.:

Letter of Reference cont'd

- A. I have personal Knowledge of the applicant and his/her ability in an employment role. Yes No
- B. I certify that I am this applicant's: Supervisor Colleague
- C. The applicant's current employer is:
- D. The main duties of the applicant are:
- E. Other duties assigned include:
- F. Is the applicant effective in the employment role? Yes No
Comment:
- G. Does the applicant work well with others? Yes No
Comment:
- H. Certification is a professional recognition of achievement. Do you feel the applicant should be granted certification in the field requested? Yes No

Comment:

Signature of Reference Person: _____ Date: _____



2460 W. 26th Ave., Suite 245-C
Denver, CO 80211
Ph: (303) 952-4013
Fax: (775) 370-4055
www.natmi.org