



# **Company Certification Packet**

**(Revised 2014)**

## Introduction

The CFESA Mission Statement clearly defines our service industry direction when it states, "CFESA anticipates trends and provide resources, training and education to support excellence in service."

Toward these end results the CFESA Board has delineated a clear and concise set of criteria which was:

- 1) Developed directly from its members;
- 2) Relevant and timely;
- 3) Reasonable and realistic for all Voting Members; and
- 4) Measurable and specific.

In order to become a CFESA Certified Company, aggressive planning, training, coordinating and organizing will be a required. Only then will total recognition be given for this prestigious achievement.

It is therefore in the best interests of all CFESA Voting Service Companies, regardless of size, resources, location or philosophy, to become a:



## *MISSION*

The Mission of the CFESA Company certification process is to provide a benchmark for all service companies, regardless of size, to strive to achieve. In meeting the qualifications of CFESA Certification, the service company will create a discipline for all its employees to focus on professionalism and customer service.

This will ultimately increase customer satisfaction and awareness, and therefore, create demand. In addition, this certification conveys to the foodservice industry that a CFESA Certified Company continually raises the standards for achieving excellence and quality customer service.

Mailing Address for all submitted materials:

CFESA  
Attention: Linda Riley  
3605 Centre Circle  
Fort Mill, SC 29715

Email address for all submitted materials:

[LRiley@cfesa.com](mailto:LRiley@cfesa.com)

<i><u>Areas of Certification Criteria</u></i>	<i><u>Total Points Achievable</u></i>
Finance	15
Training	30
Participation	24
Industry Relations	11
Professionalism	20
Extra Credit	8
<i>TOTAL</i>	<hr/> 108

**Must attain at least 90 of 108 points in order to become a CFESA Certified Company.**

### **PREREQUISITES**

There are no points awarded toward the CFESA Company Certification process for the following eight prerequisites. Prior to beginning the Company's efforts to accomplish the quantitative financial, training, participation, professional and industry relation goals, these non-waiveable prerequisites must be documented accordingly.

<b><u>Prerequisites</u></b>	<b><u>Minimum Standards</u></b>	<b><u>Documentation Process</u></b>
<b>1. Must attend at least one National conference the year of application</b>	<b>1. Attendance of at least one CFESA National Conference during the year of application.</b>	<b>1. Provide proof of attendance with packet</b>
<b>2. Have a current bank reference with a commercial banking relationship</b>	<b>2. Have your bank provide written proof of a commercial banking relationship using</b>	<b>2. Have your bank fax/mail bank relationship form directly to CFESA Headquarters using the CFESA Standardized form (PRE - 022014)</b>

<b>3. Insurance Coverage</b>	<b>3. Have insurance coverage as follows:</b> a) \$1,000,000 General Liability b) \$1,000,000 Auto Liability c) \$1,000,000 Umbrella d) Worker's Compensation e) Disability	<b>3. Have insurance carriers</b> <b>Mail/email this coverage directly to CFESA Headquarters</b>
<b>4. Corporate, Partnership or sole proprietor entity for at least 36 months</b>	<b>4. Be a recognized business entity for at least 36 months with no Chapter #7 or Chapter #11 Bankruptcy filings</b>	<b>4. Submit proof of business entity document to CFESA Headquarters testifying to existence under current title for at least 36 months using CFESA Standardized Form. (PRE – 042014) This form will include a written denial of any Chapter #7 or Chapter #11 Bankruptcy filings</b>
<b>5. Be a foodservice equipment service entity</b>	<b>5. Have at least 75% of your sales volume derived from commercial parts and service</b>	<b>5. Provide a notarized statement using CFESA Standardized Form (PRE – 052014) that 75% of your sales volume is derived from commercial parts and service</b>

<b>6. Provide service on commercial gas, steam, electric, electronic and/or refrigeration equipment</b>	<b>6. Advertise, promote and conduct gas, steam, electric, electronic and/or refrigeration services to your customer base</b>	<b>6. Submit line card, advertising literature and notarized Statement using CFESA Standardized Form (PRE – 062014)</b>
<b>7. Current CFESA Voting Member in good standing</b>	<b>7. Have all CFESA finances totally current with CFESA Headquarters and be in continuous business for the last 36 months</b>	<b>7. CFESA Headquarters will review, research and account for all open invoices with each company seeking to become CFESA Certified</b>
<b>8. Provide 12 letters of recommendation</b>	<b>8. Have 12 letters of recommendation from within the industry from end users, reps, dealers and/or equipment manufacturers</b>	<b>8. Submit 12 letters of recommendation using CFESA Standardized Form (PRE – 082014)</b>

## **FINANCE GOALS**

<b><u>Finance Goals</u></b>	<b><u>Minimum Standards</u></b>	<b><u>Requirements</u></b>	<b><u>Points Awarded</u></b>
<b>9. FIN Have and maintain a positive credit rating in the year of application</b>	<b>9. FIN Have at least 12 suppliers/vendors provide written proof of credit "worthiness" using a CFESA standardized form</b>	<b>9. FIN Have 12 suppliers/vendors provide a credit rating report using CFESA Standardized Form (FIN - 092014)</b>	<b>5 (five) Points</b>
<b>10. FIN Maintain adequate parts inventory in the year of application</b>	<b>10. FIN Must provide written proof from 12 equipment manufacturers, end users, manufacturer representatives or equipment dealers testifying that the company maintains an adequate parts inventory</b>	<b>10. FIN Have 12 equipment manufacturers, end users, manufacturer representatives or equipment dealers testify, to the best of their knowledge, that they believe an adequate parts inventory is being maintained by the Company, using CFESA Standardized Form (FIN – 102014)</b>	<b>10 (ten) Points</b>



## **TRAINING GOALS**

<b><u>Training Goals</u></b>	<b><u>Minimum Standards</u></b>	<b><u>Requirements</u></b>	<b><u>Points Awarded</u></b>
<b>11. TNG CFESA Members</b>  <b>*SEE EXTRA POINT AWARDS</b>	<b>11. TNG Have at least one employee from your company attend the CFESA Management Program</b>	<b>11. TNG CFESA Headquarters will verify all attendees from all CFESA companies seeking certification</b>	<b>6 (Six) Points</b>
<b>12. TNG Two Certifications per Technician</b>	<b>12. TNG Have at least two CFESA certifications per individual technician who has been in your company employment 3 or more years and responsible for the repair of commercial cooking and/or refrigeration equipment. (NOTE: Average of all technicians will be counted. Therefore, if you have 10 technicians a total of 20 certifications will be required.)</b>	<b>12. TNG Forward certificates of completion for CFESA Technician Certification with CFESA Company Certification using CFESA Standardized Form (TNG 122014)</b>	<b>10 (Ten) Points</b>

<p><b>13. TNG Two training course completions per technician</b></p> <p><b>*SEE EXTRA POINT AWARDS</b></p>	<p><b>13. TNG Have at least two completion certificates per individual technician from either CFESA training schools or manufacturer training schools within five years of application. (NOTE: Average of all technicians will be counted. Therefore, if you have 10 technicians a total of 20 certifications will be required.)</b></p>	<p><b>13. TNG Forward course completion certificate(s) from manufacturer training schools or CFESA training schools with CFESA Company Certification using CFESA Standardized Form (TNG 132014)</b></p>	<p><b>6 (Six) Points</b></p>
<p><b>14. TNG Have 25% technicians become CFESA Master Technicians</b></p> <p><b>*SEE EXTRA POINT AWARDS</b></p>	<p><b>14. TNG Have 25% of your technicians, who have three years of field experience or more, become CFESA Master Technicians</b></p>	<p><b>14. TNG Forward a roster of all company technicians indicating name, "time in field," and Master Technician Certification with CFESA Company Certification using CFESA Standardized Form (TNG 142014)</b></p>	<p><b>8 (Eight) Points</b></p>

## **PARTICIPATION GOALS**

<b><u>Participation Goals</u></b>	<b>Minimum Standards</b>	<b>Requirements</b>	<b>Points Awarded</b>
<b>15. PAR Must participate in the CFESA Profit Survey</b>	<b>15. PAR Must participate each year for the 5 years prior to application for Company Certification.</b>	<b>15. PAR CFESA Headquarters will verify participation in the CFESA Profit Survey for all companies seeking to become a CFESA Certified Company</b>	<b>2 (Two) Points</b>
<b>16. PAR Appropriate use and display of CFESA logo</b>  <b>*SEE EXTRA POINT AWARDS</b>	<b>16. PAR Have CFESA logo on all of the following: a)Company letterhead, business cards and invoices; b)Web site (with a CFESA link) and; c)Company service vehicles and technician uniforms</b>	<b>16. PAR Submit photographs and copies of literature depicting use and display of the CFESA Logo to CFESA Headquarters in the packet to become a CFESA Certified Company</b>	<b>2 (Two) Points</b>

<p><b>17. PAR Attendance at CFESA Regional Meetings</b></p> <p><b>*SEE EXTRA POINT AWARDS</b></p>	<p><b>17. PAR Attend at least one CFESA Regional Meeting in the year of application</b></p>	<p><b>17. PAR Verify with CFESA Headquarters that, at least one attendee, per company, has attended at least one CFESA Regional Meeting in the year of application</b></p>	<p><b>5 (Five) Points</b></p>
<p><b>18. PAR Direct CFESA participation</b></p>	<p><b>18. PAR Publish an article in On Target within the past 24 months</b></p>	<p><b>18. PAR Verify Company participant's name with CFESA Headquarters.</b></p>	<p><b>2 (two) Points</b></p>
<p><b>19. PAR Direct CFESA participation</b></p> <p><b>*SEE EXTRA POINT AWARDS</b></p>	<p><b>19. PAR <u>Actively</u> participated on a CFESA committee for 12 months or chair/co-chaired a CFESA committee within the past 24 months</b></p>	<p><b>19. PAR Verify Company participant's name with CFESA Headquarters. If qualifying as "actively participating" on a committee, obtain a letter of participation from the respective chair of that committee</b></p>	<p><b>6 (six) Points</b></p>

<b>20. PAR Direct CFESA participation</b>	<b>20. PAR Have been a CFESA board member within the past 24 months</b>	<b>20. PAR Verify Company participant's name with CFESA Headquarters.</b>	<b>2 (two) Points</b>
<b>21. PAR CFESA Representation</b>	<b>21. PAR Represent CFESA in any of the following ways in the past 36 months;</b> <b>a. by coordinating a CFESA regional meeting/workshop</b> <b>b. by acting as an invited CFESA guest speaker (after having been recommended by CFESA) at a CFESA Conference or at an allied association meeting.</b>	<b>21. PAR Verify company participation with CFESA Headquarters</b>  <u><b>Allied Associations include:</b></u> <b>FCSI</b> <b>FEDA</b> <b>MAFSI</b> <b>NAFEM</b> <b>NRA</b> <b>RFMA</b>	<b>5 (five) Points</b>

## **INDUSTRY RELATIONS GOALS**

<b><u>Industry Relations Goals</u></b>	<b><u>Minimum Standards</u></b>	<b><u>Requirements</u></b>	<b><u>Points Awarded</u></b>
<b>22. IND Pre-planned or preventative maintenance programs (PM Programs)</b>	<b>22. IND Must have an active and current standardized PM Program in place and available to your customer base</b>	<b>22. IND Submit written standardized PM Program with packet seeking CFESA Company Certification</b>	<b>2 (Two) Points</b>
<b>23. IND Customer Feedback System</b>	<b>23. IND Must have an active and current standardized Customer Feedback System in place</b>	<b>23. IND Submit written Customer Feedback results depicting a current system being utilized to CFESA Headquarters in packet seeking CFESA Company Certification</b>	<b>2 (Two) Points</b>

<p><b>24. IND Company warranty of parts and service</b></p>	<p><b>24. IND Must warrant your service work to your central customer base for at least 90 days, along with the parts you sell and/or install, according to the manufacturer's parts warranty</b></p>	<p><b>24. IND Submit your written verification of these minimum standards using CFESA Standardized Form (IND – 242014) to Headquarters in packet seeking CFESA Company Certification</b></p>	<p><b>4 (Four) Points</b></p>
<p><b>25. IND Be a CFSP, a Young Lion award winner, a Board Member or an <u>active</u> Committee Member of an allied association</b></p>	<p><b>25. IND Must be or have been a CFSP, a Young Lion, a Board Member or an <u>active</u> Committee Member of the listed allied associations, either nationally or regionally within five years of application.</b></p>	<p><b>25. IND Submit written verification of these minimum standards in a notarized statement to using CFESA Standardized Form (IND - 252014)</b></p> <p><b><u>Allied Associations include:</u></b>  <b>FCSI</b>  <b>FEDA</b>  <b>MAFSI</b>  <b>NAFEM</b>  <b>NRA</b>  <b>RFMA</b></p>	<p><b>3 (Three) Points</b></p>

## **PROFESSIONAL GOALS**

<b><u>Professional Goals</u></b>	<b><u>Minimum Standards</u></b>	<b><u>Requirements</u></b>	<b><u>Points Awarded</u></b>
<b>26. PRO Company Mission Statement</b>	<b>26. PRO Have a current company mission statement posted in all company locations</b>	<b>26. PRO Provide a copy of the company mission statement to CFESA Headquarters with packet seeking CFESA Company Certification</b>	<b>4 (Four) Points</b>
<b>27. PRO Technology</b>	<b>27. PRO Have company website and e-mail capabilities</b>	<b>27. PRO Verify company website and e-mail by communicating with CFESA Headquarters</b>	<b>4 (Four) Points</b>
<b>28. PRO Service availability</b>	<b>28. PRO Provide 24 hour service 7 days per week, 365 days per year to customer base</b>	<b>28. PRO Submit written proof from 12 end users, dealers, manufacturer representatives or manufacturers that your company provides continuous service using CFESA Standardized Form (PRO – 282014)</b>	<b>8 (Eight) Points</b>



<p><b>29. PRO Must have current written personnel policy manual</b></p>	<p><b>29. PRO Have a current written personnel policy, signed by the president, which contains a drug testing policy Special Note: This requirement must be in conformance to the local/regional legal environment in the company's jurisdiction</b></p>	<p><b>29. PRO Submit written notarized statement that your company meets the minimum standard using CFESA Standardized Form (PRO – 292014)</b></p>	<p><b>3 (Three) Points</b></p>
<p><b>30. PRO Each and every full time staff member completes one course of study, outside the immediate service industry's purview, in year 2000 or after</b></p>	<p><b>30. PRO Each full time employee (non-tech) on average must complete a continuing education course or seminar within the past 12 months, on computers, administration, finance and accounting, marketing, sales, purchasing, supervision, technical fields, public relations, leadership, safety, personnel management, etc.</b></p>	<p><b>30. PRO Provide a roster of office/administration personnel indicating which courses/seminars they have completed and submit list and certificates of completion in the CFESA Company Certification packet</b></p>	<p><b>1 (One) Point</b></p>

### **EXTRA POINT AWARD CRITERIA**

**11 TNG - Receive one (1) additional point award if two or more employees, from your company, attend the CFESA Management Program.**

**13 TNG – Receive one (1) additional point award if your technicians complete four (4) manufacturer or CFESA Training Schools within five years of application. (Note: Average of all technicians will be counted.)**

**14 TNG – Receive one (1) additional point award if 50% or more of your technicians, who have had three (3) or more years of field experience, are CFESA Master Technicians.**

**16 PAR – Receive two (2) additional points awarded if your company promotes and displays CFESA logo/literature in your company booth during approved trade shows. You must submit proof in the form of photos and a participation list from the trade show.**

**17 PAR – Receive one (1) additional point award if your company has been present at both the CFESA Spring and Fall Conferences in the prior three years of application. This totals 6 conferences.**

**19 PAR – Receive two (2) additional point awarded if you company provides a trainer for a national or regional CFESA training class during the year of application.**



# **Company Certification**

## **Forms**

(This form applies to #2 of the Prerequisite Section)

***CFESA COMPANY CERTIFICATION STANDARD FORM PRE-022014***

\_\_\_\_\_Bank and \_\_\_\_\_Company

have been engaged in a banking relationship for the past 12 months.

\_\_\_\_\_Company maintains its operating account in accordance with proper professional business principles and all known legal requirements.

\_\_\_\_\_  
**NAME, BRANCH MANAGER**

\_\_\_\_\_  
**Bank**

**PLEASE EMAIL THIS FORM TO: [LRiley@CFESA.COM](mailto:LRiley@CFESA.COM)**

**OR**

**MAIL TO: CFESA  
Atten: Linda Riley  
3605 Centre Circle  
Fort Mill, SC 29715**

(This form applies to #4 of the Prerequisite Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM PRE-042014***

\_\_\_\_\_ Company has officially been in the foodservice industry  
as a legal entity for the past 36 months. This legal entity is neither currently filing for, nor has  
ever filed for, Chapter 7 or Chapter 11 bankruptcy.

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Date

**Note: THIS NOTARIZED STATEMENT MUST BE SUBMITTED WITH PACKET.**

Notary Signature: \_\_\_\_\_

Date: \_\_\_\_\_

(This form applies to #5 of the Prerequisite Section)

***CFESA COMPANY CERTIFICATION STANDARD FORM PRE-052014***

\_\_\_\_\_ Company attests to the following sales history  
**without exception: At least seventy-five percent (75%) of our business sales volume has been achieved through commercial food equipment service and/or commercial parts sales every year for the past three (3) years.**

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Date

**Note: THIS NOTARIZED STATEMENT MUST BE SUBMITTED WITH PACKET.**

Notary Signature: \_\_\_\_\_

Date: \_\_\_\_\_

(This form applies to #6 of the Prerequisite Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM PRE-062014***

\_\_\_\_\_ Company provides service on commercial gas,  
steam, electric, electronic and/or refrigeration equipment to our entire customer base. These  
services are advertised and promoted as seen on the attached company literature.

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Date

**Note: THIS NOTARIZED STATEMENT MUST BE SUBMITTED WITH PACKET.**

Notary Signature: \_\_\_\_\_

Date: \_\_\_\_\_

(This form applies to #8 of the Prerequisite Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM PRE - 082014***

**I personally recommend and attest that \_\_\_\_\_ Company  
provides continuous and reliable service. I also personally recommend and can attest to the  
professionalism of all technicians employed by \_\_\_\_\_ company.**

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer

(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Contact Phone Number

\_\_\_\_\_ Date



(This form applies to #9 of the Finance Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM FIN – 092014***

\_\_\_\_\_ COMPANY HAS AN OPEN ACCOUNT WITH OUR COMPANY AND  
HAS MAINTAINED AND CURRENTLY MAINTAINS THIS ACCOUNT IN ACCORDANCE WITH  
PROPER AND PROFESSIONAL BUSINESS TERMS AND CONDITIONS.

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Contact Phone Number

\_\_\_\_\_ Date

**PLEASE EMAIL THIS FORM TO: [LRiley@CFESA.COM](mailto:LRiley@CFESA.COM)**

**CFESA**

**Atten: Linda Riley**

**3605 Centre Circle**

**Fort Mill, SC 27415**

(This form applies to #10 of the Finance Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM FIN – 102014***

**WE HAVE DONE BUSINESS WITH \_\_\_\_\_ COMPANY FOR AT LEAST THE PAST  
36 MONTHS AND CAN ATTEST TO THE FACT THAT THEY HAVE AN ADEQUATE PARTS  
INVENTORY WHICH SUPPORTS OUR URGENT NEEDS AND NECESSARY REQUIREMENTS. THIS  
IS ONE OF THE REASONS WE CONTINUE TO USE \_\_\_\_\_ COMPANY AND  
VIEW THEM AS A PROFESSIONAL SERVICE AND OR PARTS PROVIDER.**

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Contact Phone Number

\_\_\_\_\_ Date

(This form applies to #12 & #14 of the Training Section)

(Print as many forms as needed)

## CFESA COMPANY CERTIFICATION STANDARDIZED FORM TNG – 122014/142014

*(Combine the required information for both TNG -12 and TNG -14)*

**I certify the technician status of (company name) \_\_\_\_\_ as follows:**

(Please print or type)

[illegible]

(This form applies to #13 of the Training Section)

(Print as many forms as needed)

*CFESA COMPANY CERTIFICATION STANDARDIZED FORM TNG – 132014*

(Please Print or type)

[illegible]

(This form applies to #24 of the Industry Relations Section)

***CFESA CERTIFIED COMPANY STANDARDIZED FORM IND – 242014***

\_\_\_\_\_ **COMPANY WARRANTS ALL SERVICE WORK PERFORMED FOR  
AT LEAST 90 DAYS, TO ITS ENTIRE CUSTOMER BASE, AND THE PARTS SOLD AND OR  
INSTALLED WARRANTED ACCORDING TO MANUFACTURER'S REQUIREMENTS. THIS  
MINIMUM GUARANTEE IS PROMOTED AND MADE PUBLIC ON A REGULAR BASIS TO OUR  
ENTIRE CUSTOMER BASE.**

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Date

**Note: THIS NOTARIZED STATEMENT MUST BE SUBMITTED WITH PACKET.**

Notary Signature: \_\_\_\_\_

Date: \_\_\_\_\_

(This form applies to #25 of the Industry Relations Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM IND – 252014***

(Name) \_\_\_\_\_ OF \_\_\_\_\_ COMPANY

☐ IS OR HAS BEEN A CFSP. PLEASE SEE THE ATTACHED CERTIFICATE, WHICH SO STATES THIS.

**OR:**

☐ WAS SELETED AS A YOUNG LION AWARD WINNER IN THE YEAR \_\_\_\_\_. PLEASE SEE THE ATTACHED CERTIFICATE, WHICH SO STATES THIS.

**OR:**

☐ CORPORATION IS CURRENTLY A NATIONAL OR REGIONAL BOARD MEMBER OR AN ACTIVE COMMITTEE MEMBER OF ANY ALLIED ASSOCIATION.

**Note: THIS NOTARIZED STATEMENT MUST BE SUBMITTED WITH PACKET.**

Notary Signature: \_\_\_\_\_

Date: \_\_\_\_\_

(This form applies to #28 of the Professional Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM PRO – 282014***

**I attest to the fact that \_\_\_\_\_company provides 24 hour, 7 day a week, 365 days a year commercial service for my gas, steam, electric, electronic and/or refrigeration equipment. This continuous service is always reliable, professional and performed in the highest customer service expectations. This is one of the reasons we continue to use \_\_\_\_\_company and view them as a professional service provider.**

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Contact Phone Number

\_\_\_\_\_ Date

(This form applies to #29 of the Professional Section)

***CFESA COMPANY CERTIFICATION STANDARDIZED FORM PRO - 292014***

\_\_\_\_\_ Company has a current written  
personnel policy (see attached), signed by the president, which contains a drug testing policy.  
This requirement is in conformance with local and regional legal jurisdictions.

\_\_\_\_\_ Company

\_\_\_\_\_ Company Officer  
(Print Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_ Date

**Note: THIS NOTARIZED STATEMENT MUST BE SUBMITTED WITH PACKET.**

Notary Signature: \_\_\_\_\_

Date: \_\_\_\_\_