



How to **Earn** the  
Certified Relocation  
Professional (CRP®)  
Designation

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# Overview

The Worldwide ERC® Certified Relocation Professional (CRP®) designation is a highly regarded, competency-based credential that demonstrates a broad understanding of the field of employee mobility within the United States. Candidates achieve the designation by studying a defined body of knowledge and passing a comprehensive examination that assesses their mastery of the skills required to be considered a Certified Relocation Professional. Continuing education requirements ensure that CRP® designees' skills evolve and grow as the industry continues to change. The body of knowledge and the examination are updated annually by the Worldwide ERC® Certification Review Board, which is comprised of recognized industry professionals representing an extensive variety of expertise in human resources, corporate relocation policy, relocation appraising, residential real estate, and tax and legal issues.

**Scantron** — an accomplished full-services certification and licensure testing company with over 30 years of experience in nationally based certification and licensing programs — works with Worldwide ERC® and the Certification Review Board to aid in the development, validation and administration of the CRP® examination.

## Purposes of the CRP® Certification Program

The purposes of the Worldwide ERC® certification program are:

- To establish a common and universal understanding of the field of employee relocation.
- To recognize individuals who master the skills needed to be a professional in the field of U.S. employee relocation.
- To raise the professionalism of those involved in relocation.
- To encourage continuing education for professional development.
- To encourage self-development by offering guidelines for achievement in the relocation profession.
- To identify and award special recognition to those persons who have demonstrated a comprehensive knowledge of the principles and practices of relocation, related disciplines, and laws governing and affecting relocation.

## Upcoming and Future Examination Dates

The CRP® examination is held each year in mid-to-late May.

**2020: 13 to 29 May 2020**

**2021: 24 May to 9 June 2021**

## Eligibility Requirements

The eligibility requirements are designed to demonstrate that candidates have at least one year of work experience in relocation. You can establish your eligibility by one of two options. It is not necessary to satisfy both options.

## Option 1

You must hold a current Worldwide ERC® membership and have held Worldwide ERC® membership for at least 12 months during the 18-month period prior to the May examination date (December through May).

Membership is defined as receiving Worldwide ERC® member benefits either by holding a PERC®, Appraiser or Corporate Premier individual membership, or being designated as the member representative for a Real Estate Broker, Relocation Management or Mobility Service Provider company membership.

To qualify for the 2020 CRP® examination under Option 1, your status as an individual member is considered from December 2018 to May 2020. If, in at least 12 of those 18 months, you have been a member, you are eligible under Option 1.

## Option 2

A CRP®/SCRP® designee who is a member in good standing with Worldwide ERC® can attest to your having at least one full year of corporate relocation-related experience. The experience does not have to be from within the same company.

The CRP® or SCRCP® designee attesting to your one year of corporate relocation-related experience does so with the understanding that fraudulent statements in this regard may result in cancellation of your examination registration. In cases where the CRP®/SCRCP® designation has already been awarded, this could result in the revocation of the designation.

Both the attesting CRP® or SCRCP® designee and the CRP® candidate must have current Worldwide ERC® membership at the time that the candidate submits the CRP® examination application. You must maintain membership through the examination date.

Membership is defined as receiving Worldwide ERC® member benefits either by holding a PERC®, Appraiser or Corporate Premier individual membership, or being designated as the member representative for a Real Estate Broker, Relocation Management or Mobility Service Provider company membership.

Discuss your unique situation with the CRP® or SCRCP® designee who can attest for you to see if he/she agrees that your experience aligns with the definitions noted below:

- **Employers:** Candidate handles the development and/or administration of the organization's relocation policy for its employees.
- **Real estate brokers/agents and Appraisers:** Candidate works directly with employers, relocation management companies and/or other relocation industry service providers in home-sale or home-purchase programs. Working with transferred families does not constitute experience in these instances. CRP® candidates must be able to verify direct working relationships with employers or their designated service organization vendors.
- **Relocation service providers:** The candidate directly serves employers, relocation management firms or other relocation-industry service providers, working on their behalf, in fulfilling any aspect of an employer's relocation program.

# Examination Design and Development

The examination is a comprehensive assessment consisting of 125 multiple-choice questions. One hundred ten questions are scored; the remaining 15 questions are included as potential future questions under review for validity. Candidates have up to 3 hours to complete the examination.

Questions for the CRP® examination are written by a Worldwide ERC® CRP® Certification Review Board (CRB), which is comprised of CRP®-designated Worldwide ERC® members representing the various disciplines within the industry. The CRB receives direction in techniques for writing test questions by Worldwide ERC®'s testing partner, Scantron. Scantron reviews the questions for clarity and readability and then assembles the examination; however, the relocation professionals on the CRB develop the examination content.

Questions contained in the CRP® examination are derived from specific Worldwide ERC® educational programs and research publications known as source materials. You can purchase these materials when you register to take the examination. These source materials facilitate an independent study approach. Worldwide ERC® does not sponsor a review course and is not affiliated with any review courses provided by outside organizations.

Please note that for test security, and in accordance with standard testing procedures, examination questions are not, and never have been, released to the public.

## **CRP® Exam Study Groups**

Although Worldwide ERC® does not require, offer, or endorse study groups or classes, we are aware that candidates may feel more comfortable with having this option. Therefore, we do provide information regarding various study groups around the country, as the information is made available to us, should candidates feel the need to utilize one.

**IMPORTANT: Any registration, fee, and/or material required for these courses is completely independent of Worldwide ERC®. Attending any of these courses does not make you eligible or register you for the CRP® exam.**

This information is made available from January - May each year.

## **Choosing Site Location/Date/Time**

The CRP® examination is offered in Internet-based testing (IBT) format where candidates sit for the examination at a local testing center. Scantron sends instructions for how to reserve a testing center location, time and date four to six weeks prior to the start of the examination window.

## **Testing outside of the U.S./Canada**

You may sit for the CRP® examination at an international testing site. In addition to the regular registration fee paid to Worldwide ERC®, Scantron will collect a separate \$125 fee upon scheduling the examination location, date and time for a testing site outside of the U.S./Canada.

## Registration Information

Register for the CRP® examination by completing our online application. Registrations will be processed only after receiving all of the following:

- A completed examination application.
- CRP® attestation statement (if qualifying for the examination under Eligibility Option #2) and
- Full payment of all necessary fees.

You can pay by credit card (VISA/MasterCard/AmEx) or check.

### 2020 fees and deadlines (subject to change – finalized by 1 December 2019):

- On or before **3 February 2020**: \$275 application fee (plus membership payment, if applicable)
- Between **4 February and 9 March 2020**: \$325 application fee (plus membership payment, if applicable)
- Between **10 March and 6 April 2020**: \$405 application fee (plus membership payment, if applicable)
- Between **7 April and 28 April 2020**: \$550 application fee (plus membership payment, if applicable)

There is no guarantee of space for applications received on or after 29 April 2020. Please contact Worldwide ERC® to see if any registration opportunities remain before sending your application.

## Cancellation Procedures and Refunds

Cancellation requests received:

- On or before 9 March 2020 will be refunded \$225.
- Between 10 March 2020 and 6 April 2020 will be refunded \$175.
- Between 7 April 2020 and 27 April 2020 will be refunded \$100.
- On or after 28 April 2020 cannot be refunded.

Without exception, to meet candidates' confidentiality expectations and comply with standard examination processing criteria:

- Substitutions are not permitted,
- All changes/cancellations will be accepted only from the candidate him/herself, and
- All examination cancellations must be submitted in writing, via fax or email.

## Change Procedures and Fees

Once you choose a testing center location, date and time with Scantron, you can log-in to the Scantron website to manage any changes you need to make. Any changes in location, date and/or examination time will result in a \$50 change fee. This fee will be collected when you log-in to the Scantron IBT scheduling site and make changes. You cannot make changes within four (4) days of your testing date. **Please note that testing centers can fill up and certain dates and times may prove to be more popular than others.** This is especially true closer to the examination start date.

## Admission Letter and Examination Entrance

Once your application is approved, you will receive a confirmation email from Worldwide ERC®.

**If you do not receive this email within two weeks of when you submitted your application and paid your fees, it is your responsibility to contact Worldwide ERC® to confirm receipt of your application.**

Scantron will email instructions for how to schedule your examination testing center location, date and time four to six weeks before the examination date window begins. ***It is the candidate's responsibility to secure a testing center, date and time of his/her choice. Test sessions are booked on a first come, first served basis. Failure to book a test site will result in the candidate being considered a "no show."*** As soon as you schedule your examination, you will immediately receive an email that will serve as your admission letter. Please print and save this email.

You must present your admission letter and a government-issued identification with photo and signature (driver's license or passport) for entrance into the testing center. No bags/purses, hats, cell phones, beverages, papers, books, calculators or notes will be allowed in the test room.

### **The Score Report**

Your examination results will not be available to you right after testing. We run standard statistical tests on all the examination questions and answers to be sure that the examination is fair and valid. This is to your advantage because questions that are too confusing or "tricky" can be discovered and eliminated, which may result in a better score for you.

Your test score will be available within three weeks of the final testing date for the given year. You will be able to check your score online through Scantron's scoring portal. Score reports will also be mailed approximately two days after they are released online.

The score report indicates whether you passed or failed the examination. Your score is a scaled score (a scaled score is an arithmetic conversion of the raw scores; it is not a "number correct" or "percent correct" score). Scores can range from 200 to 800, but a total scaled score of 500 or more is required to pass the CRP® examination.

If you do not pass the examination, you will receive individual section scores listed by content area for your own performance assessment. You can use this information to identify weak areas and/or to focus future examination preparation strategies. Examination retakes are not available.

### **Designations Awarded**

Two related designations are awarded in this professional certification program: Certified Relocation Professional (CRP®) and Senior Certified Relocation Professional (SCRP®).

You need to pass the CRP® examination only one time, provided you fulfill the continuing education requirements. To attain the SCRP® designation, you will need to earn Worldwide ERC®'s Distinguished Service Award through leadership contributions to Worldwide ERC®. Such contributions include serving as a panelist or speaker at a Worldwide ERC® meeting or program, writing Mobility magazine articles that are published, and serving on special or standing committees. Learn more about this service recognition program at [www.WorldwideERC.org](http://www.WorldwideERC.org).

If you have already been recognized with a Distinguished Service Award when you pass the CRP® examination, you will automatically be granted the SCRP® designation. CRP® designees who earn Distinguished Service Award from Worldwide ERC® will automatically be elevated to the SCRP® level.

This designation recognizes individual achievement. The CRP® or SCRP® notations may not be used to imply certification of an entire organization.

### **Examination Scope**

Examination questions are designed to assess mastery of a number of tasks that have been organized into broad knowledge categories called domains.

The percentage of questions from each domain is as follows:

<b>DOMAIN</b>	<b>FINAL DOMAIN WEIGHTS</b>
1. Program & Policy	36%
2. Real Estate	34%
3. Service Delivery	30%
Total	100%

# CRP<sup>®</sup> Examination Content Areas

## 1. Program & Policy

### TASK 1

Design and maintain a mobility program, aligned with the company culture and strategy, that provides the framework for policies and program administration.

- Budgeting (e.g., cost projection, cost control/containment)

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- Economics of relocation/revenue stream (e.g., pricing and servicing models, risk management)

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- The identities and roles of the stakeholders and/or decision-makers (e.g., Procurement, HR, IT)

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- Mobility alternatives/options (e.g., telecommuters, temporary assignments, college intern assignments, business travel)

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- Tax treatment of relocation expenses

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- Worldwide ERC<sup>®</sup>'s 11 Key Elements and procedures of the amended value offer

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- The impact of the company culture and strategy

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- Revenue Ruling 82-204 (e.g., Amdahl/capital assets)

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- Capital gains taxes

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- Sarbanes-Oxley Act

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- Real Estate Settlement Procedures Act (RESPA)

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- Revenue Ruling 2005-74

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- Retention (e.g., managed move programs for entire employee population, offering alternatives to relocating)

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- Recruitment (e.g., tiered new hires, pre-employment offer counseling, area orientation, competitive policy adjustments/enhancement)

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## TASK 2

Develop and maintain mobility policies (e.g., permanent transfers, short-term assignments, group move) that align with the business strategy and are cost effective, compliant and competitive.

- Policy types and alternatives (e.g., traditional, tiered, flexible, lump sum, and capped)
- Mobility alternatives/options (e.g., telecommuters, temporary assignments, college intern assignments, business travel)
- Policy development and analysis (e.g., benchmarking, company culture and objectives, cost management)
- Recruitment (e.g., tiered new hires, pre-employment offer counseling, area orientation, competitive policy adjustments/enhancement)
- Tax assistance policies (e.g., gross-ups, tax equalization – international)
- Transportation of household goods
- Temporary living (e.g., housing, meals)
- Real estate assistance (e.g., home marketing, home buyout, buyer value option (BVO), direct reimbursement)
- Assistance for employee's loss on home sale
- Home-finding assistance (e.g., destination services, number and duration of trips)
- Purchasing closing costs (e.g., settlement statement, broker's commission, and selling costs)
- Cost-of-living assistance
- Employer mortgage programs (e.g., direct bill, mortgage subsidy programs, second mortgage)
- Renters' assistance (e.g., lease terminations, area tours)
- Group moves (e.g., implementation, execution)
- Cross-border moves (e.g., components of inbound U.S. and outbound U.S., repatriation)
- Pre-decision services
- Sarbanes-Oxley Act

## TASK 3

Provide consultation to clients, internal stakeholders, industry partners, and transferees using real estate data, trends, and industry statistics to help them make informed decisions.

- The purpose of the Worldwide ERC® Broker's Market Analysis and Strategy Report, how it is prepared, and how to review and interpret it
- Real estate terminology

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- Home sale program terminology

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  - Statistical tools for real estate (e.g., home sale prices, trending data)

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  - Cost-of-living differentials

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  - Home finding/area counseling

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  - Property management

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  - Mortgage financing

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  - Home inspection and disclosures

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  - Home marketing assistance

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  - Relocation appraisal principles and terminology

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  - Legal issues (e.g., toxic substances, property condition, disclosure)

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  - Real Estate Settlement Procedures Act (RESPA)
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#### **TASK 4**

**Plan and execute a group move, including policy development and departure/destination services coordination to fulfill the objectives for the move.**

- Communication strategy

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  - Policy development

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  - Group move implementation (e.g., workflow, process plan, logistics, timing)

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  - Mobility alternatives/options
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#### **TASK 5**

**Select and manage service providers using performance metrics to facilitate employee mobility.**

- Industry performance metrics (e.g., claims frequency, appraisal/Broker's Market Analysis (BMA) variance, customer satisfaction) and service-level agreements (SLAs)

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  - Economics of relocation/revenue stream (e.g., pricing and servicing models, risk management)

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  - The identities and roles of the stakeholders and/or decision-makers (e.g., Procurement, HR, IT)

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  - Service provider selection and management [e.g., request for proposal (RFP) development]
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## 2. Real Estate

### TASK 1

Develop and implement home sale strategy, including the potential for a guaranteed buyout, to facilitate the sale of the property.

- The purpose of the Worldwide ERC® Broker's Market Analysis and Strategy Report, how it is prepared, and how to review and interpret it
- Home marketing assistance
- Real estate terminology
- Worldwide ERC® Relocation Property Assessment
- The use of appraisals in home purchase programs
- Legal issues (e.g., toxic substances, property condition, disclosure)

### TASK 2

Explain the elements of the relocation appraisal, including forecasting, market change, and differences between the Worldwide ERC® appraisal and other types of real estate appraisals, to help the transferee and/or client understand the anticipated sales price.

- The purpose of the Worldwide ERC® Summary Appraisal Report, how it is prepared, and how to review and interpret it
- Principles of relocation appraising, including statistical tools (e.g., matched pairs analysis, market change adjustment, forecasting, gross living area)
- Types of appraisals
- How appraisals are used to determine the buyout offer
- Relocation appraisal terminology

### TASK 3

Educate the transferee about the home-finding/home-sale process and relationship between buyers, sellers, and licensed real estate salespersons/broker.

- Buyer brokerage, dual agency/mediation
- Home inspection

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- Legal considerations (e.g., disclosures, attorney review/modification)
  - Mortgage financing
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#### **TASK 4**

Evaluate the impact of the relocation property assessment and disclosures on the home sale process to help the transferee and/or client make an informed decision regarding defects, potential costs, and risks.

- The purpose of the Worldwide ERC® Relocation Property Assessment, how it is prepared, and how to review and interpret it
  - Home inspection and disclosures
  - Legal issues (e.g., toxic substances, property condition, disclosure)
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#### **TASK 5**

Administer a home sale program that complies with real estate tax laws and regulations.

- Tax treatment of home sale programs
  - Revenue Ruling 2005-74
  - Worldwide ERC®'s 11 Key Elements and procedures of the amended value offer
  - Revenue Ruling 82-204 (e.g., Amdahl/capital assets)
  - Capital gains taxes
  - Sarbanes-Oxley Act
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## 3. Service Delivery

### TASK 1

Audit transferee relocation expenses according to client policies and move-related tax regulations and process payments, ensuring proper categorization for reporting and payroll purposes.

- Tax assistance methodology
- Federal tax treatment of moving expenses
- The Worldwide ERC® Report on Home Sale Program Costs
- Budgeting (e.g., cost projection, cost control/containment)

### TASK 2

Identify transferee and family destination needs and coordinate services through a network of providers to ease the transition to the new location.

- Transferee and family considerations (e.g., social activities, child care, schools, elder care, spouse/partner assistance)
- Support for cross-border mobility

### TASK 3

Counsel transferees according to company policies and operating procedures to guide, inform, and manage expectations.

- Home sale (e.g., home marketing, home buyout, BVO, loss-on-sale)
- Home finding (e.g., purchase/rental assistance, area tours, mortgage assistance)
- Destination services
- Temporary living (e.g., housing, meals)
- Transportation of household goods
- Final move
- Expense reimbursement process
- Tax assistance

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- Property management
  - Cost-of-living assistance
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#### **TASK 4**

Identify key differences between U.S. domestic and cross-border relocations.

- Components of U.S. inbound and cross-border moves (e.g., work visas, home finding, driver's license, settling in, mortgage)
  - Transportation of household goods
  - How cross-cultural factors influence service delivery to incoming expatriates
  - Impact of cross-border mobility on family
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#### **TASK 5**

Educate transferee on mortgage practices and facilitate the application process to expedite the home purchase.

- Employer mortgage programs (e.g., direct bill, mortgage subsidy programs, second mortgage)
  - Mortgage financing
  - Purchasing closing costs (e.g., settlement statement, broker's commission, and selling costs)
  - Real Estate Settlement Procedures Act (RESPA)
  - Dodd-Frank
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# Continuing Education (CE) and Recertification

The Certified Relocation Professional (CRP®) designation signifies that those who hold it have mastered a body of knowledge and committed to ongoing education to ensure that they remain informed about new trends, best practices and evolution in the employee mobility industry. For this reason, it is important that designees engage in continuing education (CE) activities and certify that they have done so.

Worldwide ERC®'s CRP® CE and Recertification requirements are designed to help designees demonstrate that they have continued to grow their expertise. To retain the CRP® certification, you must engage in 30 hours of CE each 3-year recertification cycle to update your understanding of trends, best practices and standards in global workforce mobility.

To learn more about how to earn CE credits and recertify your CRP® designation, please visit Worldwide ERC®'s website and download the document titled "How to Retain Your CRP® Designation." We have provided some basic information below.

## **1. Accumulate a minimum of 30 continuing education (CE) credits within each 3-year recertification period, by your renewal date.**

Ten of the 30 CE credit hours must be obtained from Worldwide ERC®-sponsored educational opportunities. The remaining 20 credits may be obtained from courses sponsored by external organizations that have been pre-approved by Worldwide ERC®. You may earn all 30 hours from Worldwide ERC® programming if you choose.

Twenty of the 30 CE credits must be obtained from classes/conferences discussing U.S.-centric mobility topics/issues. The remaining 10 credits may be obtained from classes/conferences discussing international mobility topics/issues. You may earn all 30 credits from U.S.-centric courses if you choose.

## **2. Maintain membership in Worldwide ERC® annually.**

Membership is defined as receiving Worldwide ERC® member benefits either by holding a PERC®, Appraiser or Corporate Premier individual membership, or being designated as the member representative for a Real Estate Broker, Relocation Management or Mobility Service Provider company membership.

If you allow your membership to lapse for more than 3 months, your designation will be suspended, and you will not be entitled to use the "CRP" or "SCR" initials after your name in professional correspondence, in your social media profiles or in any public medium.

## **3. Remit the recertification renewal fee at the end of your 3-year recertification period to renew for a new 3-year cycle.**

Please note that you are allowed up to four and a half months beyond your expiration date to complete your CE credits, if needed, provided that your membership is current. However, the CRP® recertification renewal fee increases incrementally as a result. Therefore, it is to your advantage to complete your CE credits on or before your renewal date.

## Recertification Renewal Fee

Worldwide ERC® maintains records on your recertification credits earned through Worldwide ERC® education as well as educational programs approved for recertification by outside organizations. You can view your recertification transcript online any time throughout the 3-year recertification period.

These transcripts note the programs for which you have obtained credit and indicate which credits came from Worldwide ERC® programs versus meetings sponsored by external organizations. This way you can stay informed of the credits you still need to retain your designation. A recertification fee helps pay for some of the administrative costs of tracking and reporting CE credits for individual members.

The fee is invoiced only after completion of the CE credit requirements and is payable at the time of recertification renewal.

## The Cycle of the CRP® Program

Once you complete the examination, you can expect the following:

**Mid-June:** You can view your examination results online and will receive a score report from Castle Worldwide in the mail. Those who pass will also receive an official certificate.

**Early-to-mid July:** Worldwide ERC® will post passing lists and press kit information on its website and mail a CRP® lapel pin and recertification information.

Your recertification renewal date will be **31 July** -- 3 years after you earn the CRP® designation. You must earn necessary CE credits within this time to be eligible to renew the designation for another 3-year period. You will receive several reminders in the third year of your recertification period detailing the number of continuing education credit hours you have earned and your renewal status.

**DON'T FORGET to renew your membership every year.** Worldwide ERC® memberships run on a 12-month cycle while your CRP® recertification runs on a 3-year cycle (ending on 31 July). It is easy to get this confused, so please contact us with any questions about your status at **CRP@WorldwideERC.org** or +1 703 842 3430, ext. 1.

## Staying in Touch with Worldwide ERC®

It is your responsibility to inform Worldwide ERC® of changes to your contact information (i.e., address, company, name, e-mail, etc.) as they occur. Please submit changes in writing to Worldwide ERC®'s Professional Development Department.

Worldwide ERC®'s Professional Development department is available Monday through Friday to assist with any questions candidates may have about the CRP® program and examination application/ administration, and any questions a designee may have about his or her certification.

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