

IAAO Certificate of Excellence in Assessment Administration Program

General Procedures

Part I. General Purpose

This program was designed by the International Association of Assessing Officers to recognize governmental units utilizing best appraisal and assessment practices in their offices. The IAAO Certificate of Excellence in Assessment Administration recognizes a strong emphasis on teamwork, accomplishments, and an avenue of satisfaction among peers and constituents for excellent practices. In addition, the IAAO believes that the process of completing the required information for the Certificate will serve as a learning process for the applicant and may be used to further improve the jurisdiction's appraisal and assessment operations.

The foundation for this program shall be the latest revision of the *Assessment Practices: Self-Evaluation Guide* published by IAAO.

Part II. Application Process

- A. For those jurisdictions desiring to participate in the Certificate of Excellence in Assessment Administration Program, an application must be submitted with the accompanying fees as detailed in Part III of this document.
- B. Jurisdictions applying for the Certificate must identify the year of compliance, and this date may be no more than one year from the mailing of final notices for that year.
- C. IAAO shall assign an independent grader or panel of graders and a Mentor to determine if the jurisdiction's submission meets the criteria outlined in the *Assessment Practices: Self-Evaluation Guide*. Final determination for granting of the Certificate will rest with the CEAA Committee. Grading of the submission shall take no longer than one year from the jurisdiction's submission date.
- D. The candidate jurisdiction must be an appraisal and assessment agency and not solely an oversight agency.
- E. A jurisdiction seeking the CEAA may use outside assistance from those who are not permanent members of the jurisdiction's staff only to draft, edit, prepare exhibits, create links to exhibits (including websites, legislation, procedural rules, other documents and audio visuals) which are to be elements of the submission and administer the preparation of the CEAA report. The scope and duties of the individual will be limited to the functions above.

Those providing outside assistance must be under the direct supervision and control of the primary officer with responsibility for the preparation of the CEAA report. Those providing outside assistance are to work in close contact with a committee(s) or individual(s) created in the jurisdiction for pursuing the CEAA. All work done under the agreement is original for the jurisdiction and no “canned” or plagiarized material is included.

Those providing the outside assistance functions described above are not the final preparers of the report. That responsibility may not be delegated by the jurisdiction to those who provide outside assistance.

Part III. IAAO Certificate of Excellence in Assessment Administration Program Fee Structure:

| | Jurisdiction Size (Including both Real and Personal Property) | | |
|-----------------------------------|--|--------------------------------|---------------------------------|
| | Less than 25,000 Properties | 25,001 to 99,999 Properties | More than 100,000 Properties |
| Application Fee | \$100 | \$100 | \$ 100 |
| Completion Fee | \$250 | \$500 | \$1,000 |
| Chapter Revision Fee | \$ 50 | \$ 50 | \$ 50 |
| Annual Renewal Fee | \$100 | \$100 | \$ 100 |
| 5-Year Recertification Fee | \$250 | \$250 | \$ 500 |

Note: The above fee structure was approved by the IAAO Executive Board in May 2003 and amended in April 2009 and is subject to review each year by the Budget Committee to set the appropriate fee schedule.

Part IV. Mentor

- A. A Mentor will be assigned to each jurisdiction applying for the CEAA by the CEAA Committee Chair upon application. The Mentor will be a member of said committee.
- B. A Mentor will attempt to provide the Candidate with the support needed to effectively and successfully complete the submission and receive the Certificate. To meet this goal the objectives are:
 - 1. To ensure that the Candidate prepares a professional submission as described in the Instruction Manual under “General Guidelines”.
 - 2. To ensure that the submission can be graded efficiently and objectively.

- C. An initial meeting should be held prior to beginning the work so that the submission gets off to a good start. The meeting may be in person or by conference call. Other individuals may be included in the meeting at the Candidate's request.
- D. The Mentor does not work for the Candidate, or do work for the Candidate; however, the Mentor will do what he or she can to facilitate answering questions, getting information to or from the various outside participants (e.g. IAAO staff, CEAA Committee, grader, etc.) in the process, and provide constructive feedback to both the Candidate and the outside participants.

Part V. Grading Criteria and Certification

A. Candidate will provide IAAO with a spreadsheet showing that education for 2/3 of the professionals averaged at least 14 hours per appraisal professional for the selected year of compliance. Additionally, the only educational courses that can be applied toward the educational requirements are:

- a.) IAAO courses including workshops, IAAO conference educational sessions, one day forums and webinars.
- b.) State or province approved appraisal courses or seminars.
- c.) Appraisal designation courses.
- d.) Any education that meets the IAAO Procedural Rule 10.11.3 on Qualifying Educational Programs.
- e.) Formal internal in-house programs, workshops or courses conducted by assessing & appraisal jurisdictions and organizations.

B. IAAO will provide the Candidate an electronic copy of:

- *Assessment Practices Self-Evaluation Guide*
- *Certificate of Excellence in Assessment Administration Instruction Manual*
- *Certificate of Excellence in Assessment Administration Electronic Template*
- *Certificate of Excellence in Assessment Administration General Procedures*

C. Upon completion of the requirements identified in each chapter of the guide (see the shaded text at the end of each question in the guide), the Candidate shall submit the appropriate materials and completion fee as listed in Part III to the IAAO.

1. A grader or panel of graders shall be set up by IAAO to evaluate the answers for accuracy, completeness of information, and supplemental documentation.
2. Each question will be graded Pass/Fail. The review and evaluation must find the Candidate response to each question compliant or better to receive the points allocated to each question.

3. To receive the IAAO Certificate of Excellence in Assessment Administration, a score of 80 percent or higher must be received for each relevant chapter. All chapters are considered relevant except those which have no application to the work and activities of the office. These could include activities which the office does not perform because of pertinent state law or regulation or are conducted by another agency. (For example in some jurisdictions, Personal Property in whole or part is not taxable so those questions related to Personal Property should not be included in the report or application.) Those questions which are to be omitted must be identified in the letter of transmittal as such.

If a Candidate does not receive a score of 80 percent or higher on any chapter(s), they will be notified by their Mentor of those chapters and questions where they are not fully compliant and the Candidate will be given the opportunity to revise or provide additional documentation.

4. If the revision still is not fully compliant, the Candidate will be allowed to make a second revision but a \$50 per chapter revision fee will be assessed.

D. If a jurisdiction fails the resubmission process, the jurisdiction will be required to submit a new application with a new year of compliance, and applicable fees.

E. Successful jurisdictions shall be:

1. Awarded a plaque by IAAO honoring the jurisdiction with the IAAO Certificate of Excellence in Assessment Administration;
2. The IAAO shall prepare for distribution:
 - a.) A short news release for local publication,
 - b.) An article for *Fair & Equitable*,
 - c.) A notice to any local associations or IAAO chapters.
3. The IAAO will provide formal recognition at the Annual Conference including:
 - a.) A Name Badge Ribbon for each of the jurisdiction's attendees,
 - b.) Formal recognition for all jurisdictions that achieve certification during the prior year similar to that given to new designees.

F. Thereafter, the jurisdiction will have to submit their renewal fee for the subsequent five (5) years.

G. All Certificate holders must reapply for recertification after the completion of their fifth year Certificate holders will then have one (1) year to submit the necessary documents. (TO FACILITATE DOCUMENTATION OF MEETING THE EDUCATIONAL REQUIREMENTS, MAKE SURE ALL EDUCATIONAL

HOURS ARE TRACKED FROM THE BEGINNING DURING THE COURSE OF THE 5 YEAR PERIOD). Recertification is to be based on meeting three categories of requirements:

1. Require each Recertification Candidate to provide IAAO with a spreadsheet showing that education averaged at least 14 hours per appraiser professional per year over the five (5) year period. Appraisal professionals are those directly involved in placing values on property, including but not limited to, elected or appointed officials, executives, deputies, managers and supervisors of those directly involved in placing values on property. Additionally, the only educational courses that can be applied toward the educational requirements are:
 - a.) IAAO courses including workshops, IAAO conference educational sessions, one day forums and webinars.
 - b.) State or province approved appraisal courses or seminars.
 - c.) Appraisal designation courses.
 - d.) Any education that meets the IAAO Procedural Rule 10.11.3 on Qualifying Educational Programs.
 - e.) Formal internal in-house programs, workshops or courses conducted by assessing & appraisal jurisdictions and organizations.
2. The Candidate will rewrite four chapters (excluding Chapter 1 on the legislative environment) every five year cycle. Four new chapters must be selected each cycle until all twelve (12) chapters are rewritten. A new five (5) year cycle begins every six (6) years.
3. In addition to the educational requirements and the four chapters, recertification the Candidate will prepare a summary of material changes since their last certification including:
 - any significant new tax policy (local or state/province) changes during the last five years and what its effect was on your office;
 - any significant changes in office technology during the last five years and what its effect was on your office;
 - any significant changes in office management during the last five years and what its effect was on your office;
 - any significant changes in the organization and staffing of your office during the last five years and what its effect was on your office.

Part VI. Liability Disclaimer

The *Assessment Practices: Self-Evaluation Guide* is designed to be a self-conducted evaluation of specific accepted assessment administration and appraisal practices. It is designed to facilitate improvement and provide recognition of better assessment administration and appraisal practices. In reviewing the information and materials provided, including the responses to *Assessment Practices: Self-Evaluation Guide*

submitted for this Certificate, the IAAO has made no independent verification of the accuracy and/or completeness of the information submitted. All information received is considered reliable, true, and correct. The IAAO does not warrant or assure liability or responsibility for the accuracy, veracity, completeness, or usefulness of any of the supplied or published information. In addition, IAAO makes no warranties, expressed or implied, with regard to any of the reported practices.