

# IAAO 2012 ANNUAL REPORT

## INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS

### PRESIDENT'S REPORT

Fellow IAAO members,

In 2012, even with encouraging signs of a long-anticipated economic recovery, there were lingering challenges. Government budgets have been trimmed; work-force reductions and early retirements have become commonplace; and time and resources continue to be limited. Property tax reform is an ongoing discussion in the media. This is a familiar story—it has become our status quo. There is a certain measure of acceptance that recovery will take time and patience.



2012 President  
Debra Asbury

This past year, IAAO made positive strides to help its members, and the assessment profession, adapt to these challenges and move past them with creative solutions. The network that is IAAO allows ideas to be shared—through educational programs, AssessorNET discussion groups, publications, and meetings and conferences. The role of IAAO is now more important than ever.

The 2012 conference in Kansas City was a huge success; the more than 1,100 attendees toured IAAO Headquarters, enjoyed the wonderful event in the Power & Light District hosted by the Kansas City Chapter, listened to the jazz music that filled the air at the Sunday Night Welcome reception, and participated in a wide variety of educational sessions.

Through volunteer leaders and a dedicated staff, there have been numerous accomplishments:

- A major upgrade of the membership database and Web site that was undertaken will enhance the user experience and allow more information to be accessible to members.
- Improvements to the Web site included the following:
  - a mobile conference app that allowed attendees to access program information from their smart phones
  - expansion of Reference Desk

resources on the Library page

- a logo resource page that provides IAAO logos in approved formats
- the addition of user-friendly calendars for local regional and international events.
- The Online Learning Program was expanded with the introduction of a new Fundamentals of Assessment Ratio Studies workshop. This initial offering of the IAAO Academy online learning system will be followed by additional workshops in the coming years. IAAO currently has 12 online educational offerings, and more are planned for the future.
- A professional services firm was selected to evaluate IAAO's brand strategy, marketing, and communications.
- IAAO Webinars continue to provide a full lineup of additional online educational choices. This affordable program makes continuing education credits available to a much broader audience.
- The Professional Designation Program continues to be successful. Since the 2011 conference, 49 members have earned an IAAO professional designation. There were 114 new candidates for designation in 2012. We exceeded the 145 new candidates in 2011. The future of the designation program is bright.
- IAAO continued to expand its international presence. Representatives of IAAO attended international events and presented information on IAAO and its resources. IAAO participated in several educational programs to familiarize Chinese delegates with North American assessment practices.

I traveled to Brazil and sent officers to Jamaica to represent IAAO on the world stage. Through the use of a consultant, a measured approach will be taken as a full strategic plan for international outreach is developed.

- A Chapters and Affiliates Committee was formed to better serve the needs of these groups. Five new organizations became affiliates of IAAO in 2012: Center for Assessment and Development of Real Estate (China), Vermont Association of Listers and Assessors, International Property Tax Institute (London), Tennessee Association of Assessing Officers, and Assessors' Association of Nevada. IAAO now has 26 chapters, 56 affiliate member groups, and 110 IAAO Representatives.
- The Paul V. Corusy Memorial Library introduced a Directory of Local Jurisdiction Web Sites at conference. It is a valuable members-only resource. The library catalog had a major upgrade, eliminating several steps in the article search process and streamlining member access to IAAO articles.
- In 2012, nine jurisdictions earned the Certificate of Excellence in Assessment Administration and one jurisdiction recertified. Nineteen jurisdictions have earned the CEAA since the program's inception. This program recognizes governmental units and individuals involved with assessment that integrate best practices in the workplace. A record-setting number of jurisdictions were recognized for their accomplishment at conference.
- The new textbook, *Fundamentals of Mass Appraisal*, published in 2011, is being integrated with revised courses.



International attendees at the annual conference gather at IAAO headquarters.

Soon all courses on mass appraisal will also be fully revised, as IAAO maintains its reputation as the foremost authority on mass appraisal issues.

- A revised version of the IAAO Constitution was approved at the end of 2011. Revised bylaws and procedures were approved in 2012.
- AssessorNET, the online discussion forum for members, is actively being used to resolve current issues, share files and information, and collaborate on projects.
- IAAO continues to publish articles and information relevant to assessment professionals. *F&E Digital Edition* is being offered as a digital-only *green* choice for members who prefer this option.
- Seven technical standards are actively being updated.

I hope all the new features that IAAO is offering are responsible at least in part for the fact that membership retention remains strong at 90.7 percent. As of the end of 2012, there were more than 7,100 members. Just one year ago at this time, there were 6,867 members and the retention rate was 86.5 percent.

During these tough economic times, these numbers were achieved without raising conference fees or dues. Not only did IAAO keep a tight rein on expenses but also dramatically increased funding for scholarships and member aid programs. And, best of all, IAAO remained financially stable, with sufficient cash reserves to protect its programs and activities well into the future. Through careful management of resources the organization thrived in spite of the current economic climate.

These accomplishments speak strongly to the importance of IAAO as a resource to

its members and to others in the appraisal and assessment community. IAAO fulfills this role at a time when it is most needed. I am proud to be involved with an organization that offers so much to its members.

IAAO has prospered in 2012 largely because of its members, leaders, and contributors. Whether it was your contribution to AssessorNET or just passing along a good word about IAAO, you've helped the association grow and prosper, even in difficult times. We can define the future by sharing knowledge and growing together as we meet the challenges of today and tomorrow.

Sincerely,

*Debbie Asbury*

Debbie Asbury  
2012 IAAO President

## EXECUTIVE DIRECTOR'S REPORT

The number-crunching for 2012 is complete, and I'm proud and happy to report that IAAO has enjoyed another great year of success thanks to a multitude of exceptional volunteers and a dedicated staff.



*Executive Director  
Lisa Daniels*

The organization once again remained profitable while still offering great member benefits. There were no increases in dues or registration fees for conferences and all costs are being constrained whenever and wherever possible.

One highlight of the year for staff and members was the 78th Annual International Conference on Assessment Administration. This year was even more special because the conference took place in Kansas City, Missouri. The staff worked hard to deliver a great event and enjoyed showcasing the headquarters building. In fact, staff enjoyed showing off the entire city. A software program introduced at the conference allowed attendees to pull up their schedules and other important

information on their smart phones and tablet computers. Thanks again to all IAAO members in Missouri and Kansas who volunteered to be part of the hard-working team that brought the conference to fruition. Attendance at the 2012 conference was higher than that at any of the past seven conferences!

This Annual Report recounts the many accomplishments of the year. Participation in the Certificate of Excellence in Assessment Administration is at an all-time high, with 19 jurisdictions having earned the title and an equal number preparing to submit their information for judging. The online Marketplace was enhanced in 2012, along with many areas of the IAAO Web site, and there are plans for more changes in 2013. At the Adler Building the Internet and telephone capabilities were upgraded, and a minor facelift prepared the building for conference visitors in September.

This year will also be one to watch, with ongoing plans for boosting online education, beginning implementation of the International Strategic Plan, reactivating the Infrastructure Review Special Committee, and introducing a newly branded IAAO. The future continues to be a head-long march through the digital age. IAAO

plans to greatly expand its offering of information in digital format, both through the Paul V. Corusy Memorial Library, the only property tax research library of its kind in the world, and through electronic versions of textbooks and other materials.

With this continued growth, more new projects, and ambitious plans for the future, IAAO added two new full-time staff members this year, bringing staff to 22 members in all, and through a pilot project, a part-time Technical Assistance Project Coordinator was hired.

The words I wrote in last year's Annual Report—that IAAO's progress is fully dependent on an active and engaged membership—are just as true today. The organization moves forward only with member involvement. Thank you for being a vital part of IAAO's success. On behalf of your staff, we're proud and pleased to be working for such a supportive membership.

Sincerely yours,

*Lisa Daniels*

Lisa Daniels, CAE,\* MPA  
IAAO Executive Director  
\*Certified Association Executive

## IAAO 2012 EXECUTIVE BOARD

### OFFICERS

Debra Asbury, President

Rob Turner, President-Elect

Kim Lauffer, Vice-President

Bruce Woodzell, Immediate  
Past-President

### BOARD MEMBERS

Heather Drake, CAE, RES

Melinda Fonda

Joe Bernard Hablinski, CAE

Dorothy Jacks, AAS

Kenneth Joyner, RES, AAS

Carol Kuehn

David McMullen

Michael Miano, Associate Member

Randy Ripperger, CAE

James W. Weaver, CAE, AAS

## REPORTS BY DEPARTMENT

### RESEARCH DEPARTMENT

Mary Odom, MLS

#### Statistics

- 586 reference requests filled
- 308 new materials added to the library collection
- 5,205 documents delivered to members, saving members over \$78,000.

The IAAO Library unveiled an upgrade to *LibraryLink*, the high-performance online catalog and periodical database. *LibraryLink* empowers assessors to conduct effective research and enhances the search process with the following new features: a redesigned landing page with new menus and navigational graphics (rather than text buttons), a dropdown search box on the landing page, and sorting of search results. Moreover, personalized reviews of materials in the catalog can be added for other users to read.

Two new subject guides were posted on the library Web site. *Low Income Housing Credit Properties* features 40 carefully selected resources on the challenges of valuing LIHTC properties and recent research in this area. *Disaster Recovery* focuses on providing assistance for the damage assessment process.

A jurisdiction universe was constructed by the library in preparation for future research projects, specifically the staffing benchmark study assigned to the Research Committee. Thus far, contact information, parcel counts, and area and population data have been compiled for all states and provinces with county-level jurisdictions. Data for states with city, town, and village assessment levels will be compiled on an as-needed basis.

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***I have enjoyed using the library and will be using it much more in the months to come due to tribunal workloads and reassessment valuation deadlines.***

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**—Library usage survey participant**

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The Academic Partnership Program awarded its second grant, to Dr. Lawrence Walters at Brigham Young University, for a staffing benchmark study of assessment offices in the United States and Canada. The results will be published in 2013. The Research Committee partnered with the Library Trust Fund Committee to use monies from the trust fund for this significant research project, which is the first grant awarded from the Library Trust Fund since its inception in 1997.

#### *2012 Library Usage Survey of Members and Non-Members*

- 97 percent of users reported that the library saved them time on work projects.
- 59 percent of members used library resources during the last 12 months.



## MEMBERSHIP DEPARTMENT

Robin Parrish

### Statistics

• Members.....	7,167
• Representatives .....	110
• Affiliates .....	56
• Chapters.....	26
• Countries.....	21
• International Members .....	418

IAAO experienced a positive year in membership growth, member retention, and chartering of new Affiliate Associations in 2012. Membership reflected an increase of 46 members over the previous year and an increase in its retention rate to 91 percent. Five new Affiliates joined IAAO:

- Tennessee Association of Assessing Officers
- Vermont Association of Listers and Assessors
- Assessors Association of Nevada
- Center for Assessment and Development of Real Estate (China)
- International Property Tax Institute (London).

The IAAO Webinar Series continues to be a popular and convenient way for members to earn continuing education credits. A total of 643 site licenses were sold to participants, who viewed 12 Webinars ranging from Training in the Assessment Office, to Setting Up an Appeals Management Program, to Understanding Foreclosure Sales, the Mass Appraisal Process, learning the basics of Wind Farms, to name a few. Monthly Webinars will continue to be scheduled in 2013.

The IAAO staff was excited to host the IAAO Marketplace in the Exhibit Hall during the 78th Annual Conference in Kansas City. Attendees had the opportunity to purchase IAAO textbooks and newly designed IAAO logo merchandise such as clothing, a golf umbrella, coffee mug, water bottle, stuffed animal, business card

holder, and other items. All items are still available for purchase in the Marketplace on the IAAO Web site.

A contract was signed with JobTarget for a new Career Center for members and employers to be launched in early 2013. The Career Center will offer employment opportunities and resources for job hunters and job placement for employers for a reasonable fee.

AssessorNET continued to be one of the top benefits of membership in 2012; 44 groups shared thousands of questions and responses to assist their peers and uploaded numerous documents through the various discussion groups.

IAAO increased its presence on its Facebook and LinkedIn pages in 2012. As IAAO expands its efforts to grow internationally, the IAAO Facebook page received 371 likes and comments from individuals representing 20 different countries around the globe, and the IAAO LinkedIn page, launched in March, had 150 followers.

## PROFESSIONAL DEVELOPMENT DEPARTMENT

Larry Clark, CAE

Among the department's several achievements in 2012 was a new workshop, Valuation of Agricultural Land, which was introduced and rolled out to instructors during the annual conference. Core courses 101, 102, 201, and 112 were or are being updated to



be consistent with the latest edition of the *Property Assessment Valuation* textbook, and a contract was let to develop four new mass appraisal courses for the *Fundamentals of Mass Appraisal* textbook. In addition, contractors for updating the personal property auditing workshops were selected, and that work should be completed during the 2013 calendar year.

The number of online courses increased by two with the introduction of the RES Case Study Review workshop and the Fundamentals of Ratio Stud-

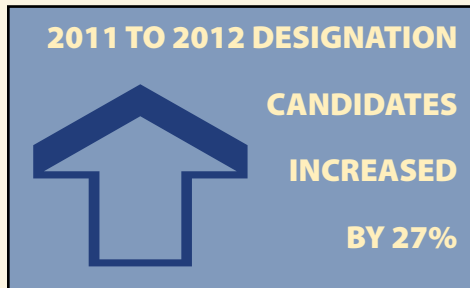


ies workshop. The latter represented the culmination of a multiyear effort by the Education Subcommittee, the Executive Board, and staff to bring the highest level of sophistication to IAAO online learning. Figure 1 compares the participation in IAAO educational offerings in 2011 with those in 2012.

**Figure 1.** Participation in IAAO educational offerings

	2011	2012	Change	Percent
Five Day Courses	3,506	3,850	344	10%
Workshops	1,346	1,202	-144	-11%
One-Day Forums	998	753	-245	-25%
Online Courses	355	470	115	32%
Self-Study	183	103	-80	-44%
Special Examinations	277	285	8	3%

IAAO contracted for the services of an outside vendor, eLogic, to translate material developed for the classroom into an online presentation that meets or exceeds current market requirements. The experience gained from that development will be used to expand online education to include all core courses.



Possibly the highlight of the year for the Professional Development Department was assisting a record number of members in achieving their professional designations. A record number of members applied for designations during 2012, and a large number of applicants are anticipated for 2013, because on January 1, 2014, the academic requirements for the real property designations will change.

It was interesting to review the history of professional designations in the 60th anniversary year of the CAE. IAAO

programs have changed significantly over time, and staff looks forward to assisting in instituting future changes.

**MEETINGS DEPARTMENT**

Aubrey Moore

In March, the GIS/CAMA Technologies Conference in San Antonio experienced a 25 percent increase in attendance over that in 2011. It was the highest attendance at a GIS/CAMA conference since 2008.

In September, the IAAO *homecoming* 78th Annual International Conference on Assessment Administration attracted 1,129 attendees, a 9 percent increase over 2011, to Kansas City. The conference also experienced a 19 percent increase in exhibitors.

The Annual Conference began with a truly Kansas City-style kickoff at the historic American Jazz Museum and Negro Leagues Baseball Museum. At the opening ceremony, attendees focused on building better government systems as they engaged with keynote presenter Ken Miller, author and founder of Change and Innovation Agency, in his presentation “Extreme Government Makeover.” A total of 57 educational sessions featured such

topics as commercial and residential issues, personal development and management improvement, administration of tax policy, and the latest in technology. One session of particular interest was “How the iPad Can Help Your Office Improve Accuracy and Efficiency,” presented by the assessment staff of King County, Washington.

***The course exceeded my expectations.***

***The practicality and relevance of the material to my actual job was right on.***

**—Student, Course 400**

**Assessment Administration**

The 78th Annual Conference was full of firsts for IAAO. The first conference mobile application for smart phones was introduced. The first live Webinar from the annual conference was recorded. The IAAO headquarters building was opened for tours, so attendees could get the full IAAO experience, and several conference events were held at the headquarters building. The Kansas City Conference was one for the memory books!



*Participation was record-breaking in the 2012 annual conference exhibit hall.*

Conference attendee Scott Teruya of Maui County, Hawaii, commented on the value of the conference experience, writing “Best opportunity to enhance yourself professionally and provide your jurisdiction with new tools and vision for the future.”

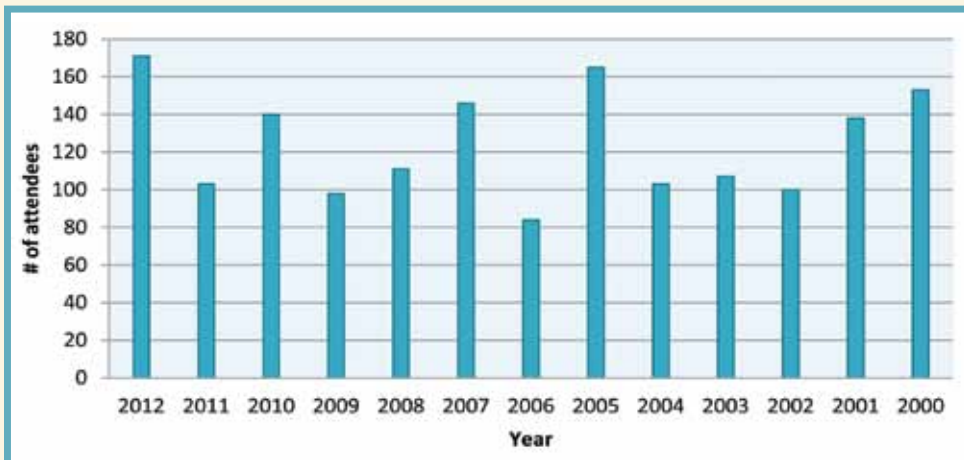


Ken Miller presented the annual conference keynote address.

At the 33rd Annual Legal Seminar in Chicago in December, attendance increased by 70 percent over that in 2011, making it the Legal Seminar with the highest attendance since the event began in 1988. (A partial history is shown in figure 2.)

The Meetings Department has now booked sites for the IAAO Annual Conference through 2017. The Executive Board selected Las Vegas, Nevada, as host for the IAAO conference September 24–27, 2017.

Figure 2. Legal Seminar attendance history



## PUBLICATIONS DEPARTMENT

Christopher Bennett

In 2012, the Publications Department continued to publish *Fair & Equitable* (monthly) and *Journal of Property Tax Assessment & Administration* (quarterly). In addition, the department publishes and maintains textbooks, technical standards, *IAAO E-News* broadcasts (every two weeks), *F&E Digital Edition*, *JPTAA Digital Edition*, and meeting materials (brochures, programs, proceedings, daily newsletter, reminder postcards, and sponsor and exhibitor materials). The department also recruits advertising for publications and the Web site.

### Publications and Print Materials

The Publications Department recruited numerous international articles for IAAO publications and routinely provided reports on significant international activities in F&E “In the News.” *F&E Digital Edition* featured a digital-only holiday section in the December issue, with videos, animation, and audio to highlight the availability of these features in a digital format. The journal’s fourth quarter issue became the first to be converted to digital page-flipping format in addition to the print format.

### Web Site

Event calendars were added to the Web site so users can automatically add event descriptions and reminders to their personal Outlook calendars.

In 2012, the Web site had 181,461 visits by 82,697 unique visitors for 716,311 page views. The Publications Department helps to maintain the Web site and the IAAO Vendor and Consultants Directory and updates many of the pages.



### Communications Committee

Usage guidelines for IAAO logos, designation logos, and the Certificate of Excellence in Assessment Administration logo were revised by the Communications Committee, and logo resource pages were added to the Web site. The Communication Committee launched the second PTAPP Survey, the results of which will be reported in 2013. The committee also began a project to cre-



President Asbury and Professional Development Director Clark on the Great Wall of China during a two-day presentation on IAAO technical standards.

ate a Spanish version of the *Glossary for Property Appraisal and Assessment*.

**Technical Standards Committee**

The Technical Standards Committee completely revised the *Standard on Assessment Appeal*, *Standard on Professional Development*, and *Guide to Assessment Standards*. Partial revisions were made to the *Standard on Digital Cadastral Maps and Parcel Identifiers*, *Standard on Mass Appraisal of Real Property*, and *Standard on Ratio Studies*. A full revision of the *Standard on Digital Cadastral Maps and Parcel Identifiers* was also initiated and will continue into 2013.

***I know I am a better Assessor due to my involvement with IAAO.***

—IAAO Representative Jack McNally,  
Lonoke County, Arkansas

The committee continued work on *Framework for Developing a Property Tax System Based on Mass Appraisal Designed to Achieve Market Value of Real Property*, a document intended to provide guid-

ance on mass appraisal processes for the international community.

**ADMINISTRATION DEPARTMENT**

Angela Blazevic, AAS  
The Administration Department manages four main areas: Budget/Audit/Financials, Technology, Human Resources/Benefits, and Facilities.

**Budget/Audit/Financials**

Figure 3 shows preaudit 2012 revenues and expenses by program.

An independent accounting firm completed an audit of the association’s financials for 2011 and declared that IAAO was in conformity with generally accepted accounting principles (GAAP) in the United States (a *clean audit*).

The IAAO fixed income investments are currently 98 percent invested, thereby helping the interest income revenue.

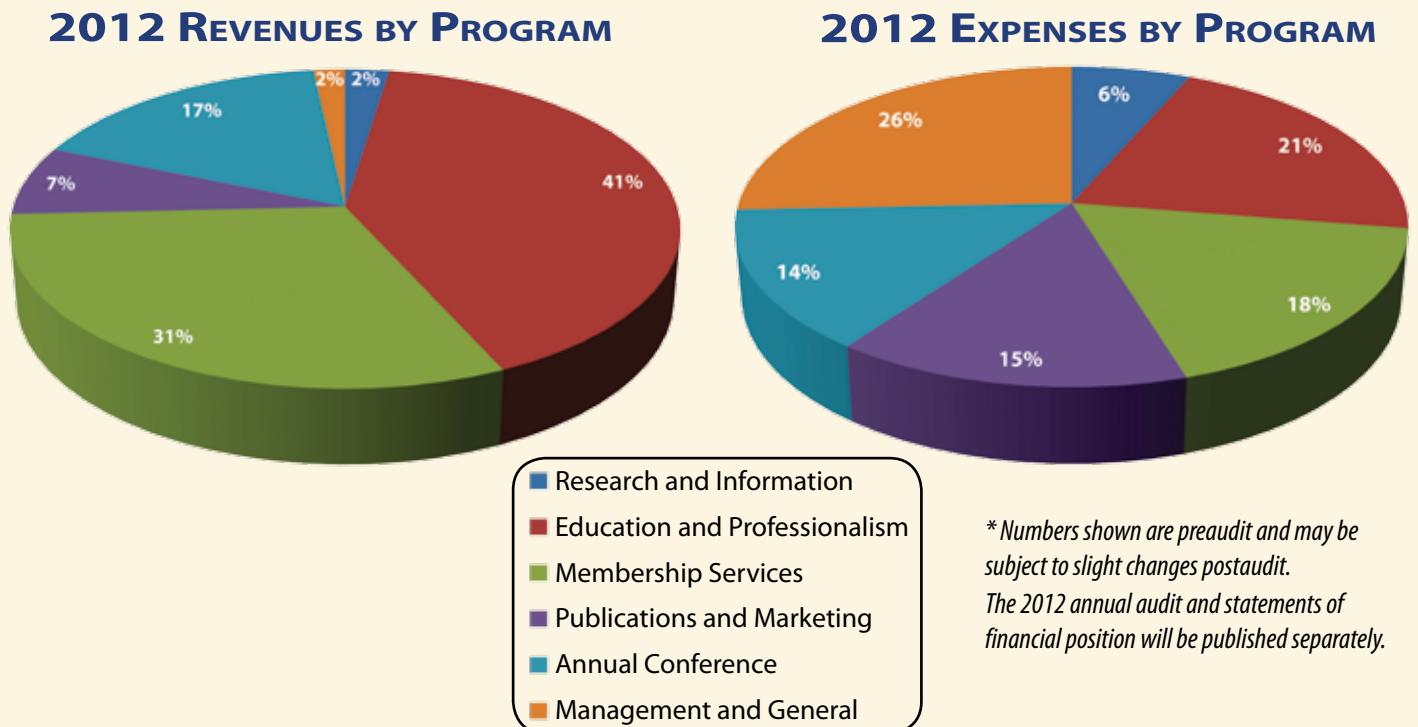
The Budget Committee presented the 2013 proposed budget to the Executive Board at its November meeting in Memphis, Tennessee, and it was adopted.



As part of a five-year plan, the newest initiative and cost-cutting process adopted by the Administration Department was kicked off by scanning all payables and filing electronically. All hard-copy documents are now shredded.

In 2012, the Scholarship Committee awarded nearly \$17,000 for educational activities and attendance at the annual conference, at the GIS/CAMA Technologies Conference, at the Preparation and Trial of the Property Tax Assessment Appeal Seminar, and at the IAAO Instructor Training Workshop.

**Figure 3.** Preaudit revenues and expenses\*



\* Numbers shown are preaudit and may be subject to slight changes postaudit. The 2012 annual audit and statements of financial position will be published separately.

In addition, two scholarships for registration at the annual conference were awarded from the Barbara Brunner Committee Fund; the IAAO Hardship Grant Committee awarded \$1,300 to assist in payment of membership dues renewals; and \$2,350 was awarded from the Timothy Hagemann Memorial

Fund to help members employed by smaller and rural jurisdictions obtain membership and/or attend the IAAO annual conference.

**Technology**

IAAO launched a new and much improved Web site Marketplace and introduced it at the annual conference.

A representative from the membership database consulting firm reviewed procedures and best practices and trained staff on new uses. Each IAAO department spent time with the consultant reviewing their module(s) and gaining information into ways to better serve the membership.

**Human Resources/Benefits**

Anticipating another year of increased healthcare premiums, the department changed healthcare providers for staff and their families, thereby continuing to provide the best coverage affordable.

**Facilities**

Repairs and updating to the building continued; many of the hardwood floors in the hallways and steps were restored to their original luster.

IAAO added a fourth copier and for 2012, staff made over 2,000,000 copies with the majority of these made in the Professional Development Department.

IAAO updated the telephone system and changed providers, resulting in additional lines for conference calls, a faster Ethernet line, and all at a much lower annual cost.

**2012 Committee Chairs**

Appraisal Foundation	Board of Trustees Representative Robert Latham Harris, CAE
Association of Appraiser Regulatory Officials	Paul A. Welcome, CAE
Coalition of Geospatial Organizations	Representative Neal D. Carpenter, CMS Alternate Representative Debra Asbury
Associate Member Committee	Lourdes Aguiar
Audit Committee	Randy Ripperger, CAE
Budget Committee	Rob Turner
Chapters and Affiliates Committee	Lisa Andres
Communications Committee	L. Wade Patterson
Conference Content Committee	Martin D. Marshall
Councils & Sections Committee	Tim Boncoskey
Computer Assisted Appraisal Section	Albert Wm. (Bill) Marchand
Mapping & GIS Section	James J. Meyer
Metropolitan Jurisdiction Council	Michael L. Brooks
Past Presidents Council	Guy Griscom, CAE
Personal Property Section	Lorene N. Bayan-Wilson
Public Utilities Section	Glen W. Lightner
State & Provincial Council	Faye Tate
Tax Collection Section	Tiffany Seward
Ethics Committee	Peter C. Weissenfluh
Legal Committee	Deborah S. Cartwright
Local Host Committee	Paul Welcome, CAE
Member Recognition Committee	Lee Ann Kizzar
Membership Services Committee	Wendel Ingram, Jr.
Nominating Committee	Bruce Woodzell
Planning & Rules Committee	Robert M. Boley, AAS
Professional Development Committee	Gary J. McCabe, CAE
Education Subcommittee	Robert P. Reardon, CAE
Professional Designation Subcommittee	Darwin Lee Kanius, CAE
Instructor Relations Subcommittee	Barry Couch, CAE
Research Committee	Ron Rakow
Scholarship Committee	T. Dwane Brinson, CAE
Technical Assistance Committee	Roland S. Ehm
Technical Standards Committee	Alan S. Dornfest, AAS
USPAP and Appraiser Regulatory Advisory Committee	James F. Todora, CAE
Friends of the Paul V. Corusy Library Trust Committee	Anthony Hagenstein, CAE
Jeff Hunt Memorial Candidates Trust Committee	John T. Burgiss, RES
Timothy Hagemann Memorial Membership Trust Committee	Teresa D. Hattemer, RES
Curriculum Development Special Committee	Virginia R. Whipple, AAS
International Special Committee	Dorothy Jacks, AAS David McMullen Co-Chairs

