

IAAO COORDINATOR'S HANDBOOK

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(Subject to Change)*



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Table of Contents

INTRODUCTION	4
ABOUT IAAO	5
Mission Statement	5
IAAO Vision Statement	5
Structure	5
Executive Board	5
Professional Development Committee	5
Instructor Relations Sub-Committee	6
Headquarters' Staff	6
<i>Departments</i>	6
SETTING UP A PROGRAM: COURSES AND WORKSHOPS	8
Application Procedures	8
Certified Program	8
Contract Program	8
IAAO Conducted Program	9
Cancellations	9
SETTING UP A PROGRAM: ONE –DAY FORUMS	10
Application Procedures	10
Wholesale	10
Cancellations	10
PROGRAM CODES/HOURS	11
IAAO-Courses	11
IAAO Workshops	11
IAAO Forums	12
Instructional Hours	12
COURSE DESCRIPTIONS	13
IAAO Course Descriptions	13
IAAO Workshop Descriptions	16
INSTRUCTOR PROCEDURES	21
Application Procedures	21
<i>Instructor Criteria as Approved by Executive Board</i>	21
Selection	21
Qualifications	22
Conduct	24
Maintaining Instructor Status	25
Evaluations	27
Honorariums	29
Instructor Training Workshop	29
Trainee Assisgnments	30
Choosing an Instructor	31
Responsibility to the Instructor	31
Instructor Fees	31
State Appraisal Certifications	31

Advertising	31
ORDERING MATERIALS	32
Textbooks	32
Shipping MAterials/Final Count.....	33
EXAM/EVALUATION PACKET (EEP)	33
Examination Security Forms	34
Final Examinations.....	35
Requests for Manual Grading.....	35
IAAO Policy Statement on Cheating	35
AFTER THE PROGRAM.....	33
Returning Materials.....	34
Returning the Exam/Evaluation Packet (EEP)	35
Billing.....	35
Student Information.....	37
<i>Examination Processing</i>	37
<i>Examination Report and Certificates</i>	37
IAAO Recertification Credit.....	38
State Appraisal Board Licensing/Continuing Education Credit.....	38
Requests for Manual Grading.....	38
STAFF DIRECTORY.....	39
IAAO CHECKLIST FOR COURSES/WORKSHOPS	40
ATTACHMENTS	41

Introduction

The International Association of Assessing Officers has developed this handbook for IAAO Coordinators. It has been created as a resource for coordinators needing information on the administrative duties and specific coordinator rules and regulations. The procedures outlined below are to be followed unless the IAAO Professional Development Department has given prior written approval for variations. Coordinators should read this handbook to familiarize themselves with the functions of IAAO organization.

The IAAO Professional Development Department is aware that many problems may arise that are not included in this handbook. Anyone needing additional assistance should not hesitate to call the IAAO Professional Development Department at 816-701-8100 for assistance. IAAO office hours are 8:00 a.m. – 5:00 p.m. CST.

About IAAO

The International Association of Assessing Officers is a nonprofit, educational and research association. It is a professional membership organization of government assessment officials and others interested in the administration of the property tax. The IAAO was founded in 1934, and now has a membership of more than 7,000 members worldwide from governmental, business, and academic communities.

The *mission* of IAAO is to promote innovation and excellence in property appraisal, assessment administration, and property tax policy through professional development, education, research, and technical assistance.

It is the vision of IAAO to be the internationally recognized leader and preeminent source for innovation, education and research in property appraisal, assessment administration and property tax policy.

The IAAO's members subscribe to a Code of Ethics and Standards of Professional Conduct and to the Uniform Standards of Professional Appraisal Practice.

Structure

IAAO is governed by its membership. Its basic law is a written constitution adopted by the membership and amendable only by the membership. An Executive Board, elected by the members, is the legislative and policy-determining agency of the association. IAAO's headquarters is located in Kansas City, where an Executive Director, appointed by the Executive Board and a full-time staff carry out a diversified program of services and activities for the members.

Executive Board

The Executive Board is the governing body of the Association. It has the power to pass any resolution it may deem necessary to accomplish the purposes of the Association and which is not in conflict with any of the provisions of the Constitution. The Executive Board also establishes the Association bylaw, which contain all of the rules regulations, and procedures necessary to govern the Association.

Voting Members of the Executive Board consist of the President, President-Elect, Vice-President, Immediate Past-President, as officers and nine (9) regular members and one (1) associate member. Three regular board members shall be elected annually to three-year terms. An associate member will be elected every third year for a three-year term. The President shall be the chairman of the Executive Board and preside at all meetings of the regular members held for the purpose of transacting Association business. The President-Elect shall exercise all the powers and duties of the President during the President's absence or inability to act. The Vice-president shall exercise all the powers and duties of the President and President-elect in their absence or inability to act.

Professional Development Committee

The purpose of this committee is to support the mission and commitments of the IAAO by addressing the educational and professional designation needs of the Association members including instructors and annually award the IAAO Lifetime Achievement Award. The committee

consists of three subcommittees that deal primarily with three primarily with three areas of concern, education, professional designations and instructors.

Instructor Relations Sub-Committee

I. Purpose:

The purpose of this sub-committee is to support the mission and commitments of the IAAO by establishing a process for the training, development and recruitment of new instructors; conducting an annual evaluation of instructor performance; and developing criteria for qualifying instructors.

II. Responsibilities:

In addition to special projects assigned by the Executive Board, this sub-committee should:

- A. Modify and maintain the Instructor Training Workshop (ITW) to develop and maintain an adequate cadre of instructors.
- B. Establish educational and experience criteria for participants in an ITW.
- C. Establish requirements and criteria for the various instructor classifications.
- D. Train, coordinate, and monitor the quality of instructors.
- E. Annually notify instructors of their performance.
- F. Work with and maintain close liaison with state and provincial education coordinators.
- G. Annually at the IAAO conference, conduct an ITW, Instructor's Update Workshop and Education Coordinator's Meeting.

Headquarters Staff

The Association's Executive Director directs the staff at its headquarters located in Kansas City, MO. The Executive Director is responsible for the general day-to-day administration of affairs of the Association.

Departments

I. Professional Development:

This department is charged with the responsibility of developing, administering, and teaching courses, workshops, seminars, self-study curriculum, online offerings and other arrangements that will meet the education objective of the association. It is also responsible for the administration of the Professional Designation Program (PDP).

II. Administration:

The Administration Department is responsible for the general operations of the IAAO office. It provides all basic, necessary and required support functions for each department's activities. The primary responsibilities of this department include, but are not limited to general office, accounting, financial, legal, personnel, inventory, technology, marketing and administration. Staff support is provided to the Executive Director, Executive Board and Executive Committee.

III. Publications:

This department is responsible for all IAAO publications except course manuals and marketing materials. The department solicits content for publications, edits and writes content, does layout, design, and photography, and works with printers to produce and

distribute final products. This department is responsible for the publication of Fair & Equitable magazine, the Journal of Property Tax Assessment & Administration and IAAO books.

IV. Meetings:

Conference and Meetings is responsible for the booking and overall coordination of all aspects of the Annual International Conference, including educational offerings, the tradeshow and special events. This department is also responsible for the booking and coordination of all Executive Board and committee meetings, and the logistical coordination of the GIS/CAMA Technologies Conference. They are responsible for the coordination of all IAAO-Conducted programs.

V. Membership Department:

This department maintains the membership database and related membership programs. They assist state representatives, chapters, affiliates and members in promoting membership and the benefits that go with membership.

VI. Research and Technical Services:

This department has the responsibility to study thoroughly the property tax and its administration through scholarly and scientific investigation and inquiry. Their research effort is guided, assisted, and supported by the Research Committee and the Paul V. Corusy Memorial Library. The library maintains a large collection of materials for use by members, students, policy makers, and other outside researchers.

Setting up a Program: Courses and Workshops

Application Procedures

IAAO offers three different types of programs for courses & workshops and two types of programs for one-day forums; each is specifically designed to meet the needs of our coordinators and students. The three types of programs for courses and workshops are: Certified, Contract and IAAO-Conducted. The two types of programs of one-day forums are: Certified and Wholesale.

Certified

In a **CERTIFIED PROGRAM** the sponsoring agency is responsible for securing the instructor and will be responsible for all expenses and honoraria incurred by and for the instructor. The instructor must be a currently approved IAAO instructor.

The sponsoring agency will arrange for classroom facilities. The sponsor will also assume the cost of all audiovisual equipment ordered for the program(s), if any.

The sponsoring agency will handle all registration, including the collection of tuition and fees. IAAO will bill the agency on a “per student basis” for each student attending, whether or not he/she attempts the final examination.

IAAO will provide program materials to the agency. The materials include the program’s Student Reference Manual, solution pages, and final examination.

IAAO will assume all shipping costs of material and texts to the program. IAAO will assume a one-time shipping charge based on the enrollment estimate given by the agency at least 15 days in advance of the first day of the program(s). If a final enrollment figure is not given at least fifteen days before the first day of the program(s), the agency agrees to pay the necessary air freight charge which may be incurred by IAAO in order to ensure the timely arrival of the material. If additional material is to be shipped by IAAO as a result of an underestimate of enrollment by the agency, the additional charges will be assumed by the agency.

Contract

In a **CONTRACT PROGRAM**, the sponsoring agency will arrange for all classroom facilities. The sponsor also assumes the cost of all audiovisual equipment ordered for the program(s), if any.

The sponsoring agency will handle all registration, including collection of tuition and fees. IAAO will bill the agency on a “per student basis” for each student attending, whether or not he/she attempts the final examination. **Contract courses have a minimum enrollment requirement of 25 students.**

IAAO will assign one qualified instructor for each class and will pay a flat fee for each instructor. IAAO reserves the right to assign any instructor to a program. Emergencies may require reassignment of instructors. Further, IAAO reserves the right to assign an instructor trainee to any scheduled program.

In a contract program IAAO reserves the right to assign an instructor trainee to any scheduled course. IAAO will provide program materials to the agency. The materials include the program's Student Reference Manual, solution pages, and final examination.

IAAO will assume all shipping costs of material and texts to the program. IAAO will assume a one-time shipping charge based on the enrollment estimate given by the agency at least 15 days in advance of the first day of the program(s). If a final enrollment figure is not given at least fifteen days before the first day of the program(s), the agency agrees to pay the necessary air freight charge which may be incurred by IAAO in order to ensure the timely arrival of the material. If additional material is to be shipped by IAAO as a result of an underestimate of enrollment by the agency, the additional charges will be assumed by the agency.

IAAO-Conducted

An IAAO **CONDUCTED PROGRAM** is the third type of educational offering. IAAO is responsible for promotion, student registration, on-site distribution of materials, classroom facilities, audiovisual equipment, preparation and shipment of materials, instructor selection, honorarium, exam processing, and student record maintenance.

IAAO will assign instructors and send a confirmation letter and Contract for Teaching Assignment to the instructor.

IAAO Senior Instructors receive preference when making assignments. Instructors will be selected on a rotational basis. If an instructor declines an assignment, his/her name will be returned to the rotation.

IAAO will pay the instructor honorarium. Instructors should make their own hotel accommodations and transportation arrangements.

Teaching assignments will usually be made 30 or more days in advance of the first day of the program.

All assignments are made on the assumption that the instructor will teach one class of 50 or fewer students for 30 instructional course hours or the assigned number of workshop hours and proctor the final examination.

Cancellations

The sponsor may cancel the program(s) without penalty for up to 10 business days before the first day of the program(s), except that the sponsor may be liable for any cancellation fees the instructor incurs as a result of having to cancel special fare airline tickets. After the **10 business days deadline**, **the sponsor will assume total liability for all charges incurred by IAAO.**

Setting up a Program: One-Day Forums

Effective January 1, 2003, the Professional Development Department reintroduced the One-Day Forum Offerings. The program is designed as a supplement to the existing IAAO course and workshop curriculum. IAAO recognizes the need to provide alternative educational opportunities in a time of dwindling resources, which has had a major impact in the reintroduction of this program.

The concept of offering programs that allow professional growth at a low cost while reducing time out of the office is not new. The One-Day Seminar Program is the perfect option for alternative educational access.

Application Procedures

IAAO offers three different types of programs for courses & workshops and two types of programs for one-day forums; each is specifically designed to meet the needs of our coordinators and students. The three types of programs for courses and workshops are: Certified, Contract and IAAO-Conducted. The two types of programs of one-day forums are: Wholesale and Certified.

Wholesale

In a **ONE-DAY FORUM WHOLESALE PROGRAM**, all wholesale forums are pre-paid orders only.

The sponsoring agency will arrange for the selection of the instructor and all classroom facilities. The sponsor also assumes the cost of all audiovisual equipment ordered for the program(s), if any.

The sponsoring agency will handle all registration, including collection of tuition and fees.

IAAO will provide only the Student Reference Manual to the agency and there is a "no return" policy on unused manuals.

Once you have selected the type of program that best fits your needs you are ready to begin the application process. See the attachment for copies of the Contract (#1) and Certified Course Applications (#2), Wholesale Order Forum (#3) and the IAAO Fee Schedule (#4). If you need additional copies of an application please contact the Education Manager at 816-701-8133.

Cancellations

The sponsor may cancel the program(s) without penalty for up to 10 business days before the first day of the program(s), except that the sponsor may be liable for any cancellation fees the instructor incurs as a result of having to cancel special fare airline tickets. After the **10 business days deadline**, **the sponsor will assume total liability for all charges incurred by IAAO.**

Program Codes/Hours

IAAO offers 14 courses that are five days in length and consist of 30 instructional hours, exclusive of the final examination. The IAAO workshop series consists of 26 one to three day programs. Exams are offered for the majority of the workshops. The IAAO One-Day Forum series currently consists of 8 one-day programs. IAAO Curriculum is listed below including, codes, titles, and hours.

Course No.	Course Title	Hours
101	Fundamentals of Real Property Appraisal	30.0
102	Income Approach to Valuation	30.0
112	Income Approach to Valuation II	30.0
201	Appraisal of Land	30.0
300	Fundamentals of Mass Appraisal	30.0
311	Residential Modeling Concepts	30.0
312	Commercial/Industrial Modeling Concepts	30.0
331	Mass Appraisal Practices & Procedures	30.0
332	Modeling Concepts	30.0
333	Residential Modeling Applications	30.0
400	Assessment Administration	30.0
402	Tax Policy	30.0
500	Assessment of Personal Property	30.0
600	Principles and Techniques of Cadastral Mapping	30.0
601	Cadastral Mapping – Methods & Applications	30.0
Workshop No.	Workshop Title	Hours
100	Understanding Real Property Appraisal	15.0
150	Mathematics for Assessors	15.0
151	Uniform Standards of Professional Appraisal Practice	15.0
155	Depreciation Analysis	15.0
157	The Appraisal Uses of Excel Software	15.0
158	Highest and Best Use	15.0
162	Marshall & Swift Residential	15.0
163	Marshall & Swift Commercial	15.0
171	IAAO Code of Ethics, Canons & Standards of Profess. Conduct	7.0
181	USPAP 7-Hour Update Mass Appraisal	7.0
191	USPAP 7-Hour Update	7.0
252	Valuing Property Affected by Environmental Contamination	15.0
257	Fundamentals of Industrial Valuation	15.0
260	Valuation of Agricultural Land	18.5
354	Multiple Regression Analysis for Real Property Valuation	11.0
403	Property Tax Policy, Alternatives & Modules	18.5
452	Fundamentals of Assessment Ratio Studies	18.5
551	Valuation of Machinery and Equipment	18.5
552	Personal Property Auditing, Basic	18.5
553	Personal Property Auditing, Advanced	18.5
650	Cadastral Mapping Workshop	15.0
651	GIS for Assessors	15.0
850	CAE Case Study Review Workshop	18.5
851	RES Case Study Review Workshop	18.5
852	AAS Case Study Review Workshop	18.5
854	CMS Case Problem Review Workshop	15.0

One Day Forums:

Forum	Title	Hours
909	Valuation of Commercial Properties in a Declining Market	7.5
910	Valuation of Convenience Stores	7.5
911	Valuation of Contaminated Properties	7.5
917	How to Critique an Appraisal	7.5
931	Reading and Understanding Leases	7.5
932	Restructuring Income/Expense Statements	7.5
960	Marshall & Swift Residential – Square Foot Method	7.5
962	Marshall & Swift Commercial – Square Foot Method	7.5

Instructional Hours

Agencies have been informed and expect IAAO courses to consist of 30 instructional hours, exclusive of the final examination, and may base attendance credit on this figure. Therefore, IAAO instructors must ensure that the courses they teach run the allotted 30 hours. No agency should abbreviate the schedule in any way. Unauthorized abbreviations of a course may cause the agency to reassess the credit granted, and may also affect the instructor's IAAO annual performance rating.

The IAAO Education Subcommittee has recommended, and agencies have been informed, that the following is the regular schedule for all IAAO courses.

Monday (registration)	7:30 a.m.-8:00 a.m.
Monday (instruction)	8:00 a.m.-5:00 p.m.
Tuesday (instruction)	8:00 a.m.-5:00 p.m.
Wednesday (instruction)	8:00 a.m.-5:00 p.m.
Thursday (instruction)	8:00 a.m.-5:00 p.m.
Friday (instruction/exam)	8:00 a.m.-5:00 p.m.
(Examinations allow 2 ½ hours for workshops, 3 ½ hours for courses)	

There should be two fifteen-minute breaks each day, one in the morning and one in the afternoon. In addition students will be allowed at least one one-hour lunch period per day. Depending on the local sponsor, some courses may not meet for five days in a row. Courses, for example, may meet one day a week or for several days over a couple of weeks.

Agencies may alter the recommended schedule if they advise IAAO of their intention prior to the course and schedule for the appropriate number of hours.

Schedules for workshops should consider the specified number of instructional hours. Workshop schedules should also include appropriate morning and afternoon breaks and a lunch hour.

Course Descriptions

Courses: Thirty hours of instruction and a final examination.

Course 101 - Fundamentals of Real Property Appraisal

The Fundamentals of Real Property Appraisal is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of vacant and improved properties. This course concentrates on the skills necessary for estimating the market value of properties using two approaches to value: the cost approach and the sales comparison approach. The Fundamentals of Real Property Appraisal utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. *Recommended: Property Assessment Valuation (PAV) textbook (3rd edition), AQB Approved: 33.50 CE with exam / 30 CE no exam*

Course 102 - Income Approach to Valuation

The Income Approach to Valuation is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of vacant or improved properties by the income approach. The material covers real estate finance and investment, capitalization methods and techniques, analysis of income and expenses to estimate operating income, selection of capitalization rates, and application of the approach. The Income Approach to Valuation utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. *Recommended: Course 101, Property Assessment Valuation (PAV) textbook (3rd edition), AQB Approved: 33.50 QE, 33.50 CE with exam / 30 CE no exam*

Course 112 - Income Approach to Valuation II

Course 112 - Income Approach to Valuation II is an intermediate level program designed for the practicing appraiser. It builds on the training of IAAO Course 102. An understanding of the income approach to value and practical experience with income capitalization are essential prerequisites. Problem solving requires a calculator with a power key.

This course makes extensive use of financial compounding and discounting techniques. Emphasis is on developing financial factors by way of electronic devices with only slight references to preprinted tables. Forecasting income patterns and property value changes are prominent variables used in estimating present values. Formula driven models are the primary appraisal tools versus look up tables and vertical calculations. Market value estimates through yield capitalization are the principal focus of the course.

The five chapters are a combination of lecture aided in outline form, example Practical Applications, student Exercises and Review Questions. PowerPoint slides assist in conveying the material. Case studies are included to help the student relate the problems to real life situations. Two quizzes help the students measure their progress. All exercises include suggested solutions. *Recommended: Course 101, Course 102, Property Assessment Valuation (PAV) Textbook (3rd edition), AQB Approved: 33.50 QE, 33.50 hours CE with exam / 30 hours CE no exam*

Course 201 - Appraisal of Land

Appraisal of Land is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of land. This course concentrates on the skills necessary for estimating land value primarily using the sales comparison approach. *Recommended: Course 101, Course 102, Property Assessment Valuation (PAV) Textbook (3rd edition), AQB Approved: 33.50 CE with exam / 30 CE*

Course 300 - Fundamentals of Mass Appraisal

This course provides an introduction to mass appraisal and is a prerequisite for the 300 series of courses offered by the IAAO. Topics covered include single-property appraisal versus mass appraisal, components of a mass appraisal system, data requirements and analysis, introduction to statistics, use of assessment ratio studies in mass appraisal, modeling of the three approaches to value, and selection of a mass appraisal system. *Recommended: Course 101, Course 102, Fundamentals of Mass Appraisal (FMA) textbook, AQB Approved: 33.50 hours CE with exam / 30 hours CE*

Course 311 - Residential Modeling Concepts

Course 311 presents a detailed study of the mass appraisal process as applied to residential property. Topics covered include a comparison of single-property appraisal and mass appraisal, the major steps in the mass appraisal process, data requirements, market analysis, application of the approaches to value, use of sales ratio studies, and valuation review techniques. *Recommended: Course 300 - 30 hours CE*

Course 312 - Commercial/Industrial Modeling Concepts

Course 312 presents a detailed study of the mass appraisal process as applied to income-producing property. Topics include income property data, market analysis, sales comparison approach, cost approach, cost approach, gross and net income analysis, capitalization rate development, model specification and calibration, and value review and maintenance. *Recommended: Course 300 - 30 hours CE*

Course 331 – Mass Appraisal Practices and Procedures

This course is designed to build on the subject matter covered in Course 300 – Fundamentals of Mass Appraisal and prepare the student to take the more advanced mass appraisal courses. It teaches the student how to use Excel and SPSS to analyze data and apply it. Much of the emphasis will be on data accumulation and analysis primarily directed toward the cost approach. Along the way the student will learn how to use the graphing and analysis tools within Excel for ratio studies in addition to supporting existing cost schedules or building new ones. *Recommended: Course 300, Fundamentals of Mass Appraisal textbook (FMA) - AQB Approved: 33.50 CE with exam / 30 CE*

Course 332 – Modeling Concepts

This course introduces and explains fundamentals of mass appraisal model building. Chapter 1 explains the role of models in mass appraisal and describes basic model structures and steps in model development. Chapter 2 covers exploratory data analysis, including descriptive statistics, charts and graphs, and spatial analyses. Chapter 3 describes data transformations, which largely determine the accuracy, achieve for a given database. Chapter 4 introduces multiple regression analysis, including regression statistics and options, the interpretation of results, and separation of land and building values. Chapter 5 covers the review and support of mass appraisal values and chapter 6 describes mass appraisal reporting. The course includes a large number of demonstrations and labs using Excel, which is capable of producing basic models for a limited number of variables. *Recommended: Course 300, Course 331, Fundamentals of Mass Appraisal textbook (FMA) – AQB Approved: 33.50 CE with exam / 30 CE*

Course 333- Residential Modeling Applications

Course 333 focuses on mass appraisal model building for residential properties. Chapter 1 explains the different types of mass appraisal models, types of data used in models, steps in model development, software tools available for modeling, and key regression concepts and statistics. Chapter 2 introduces the student to features contained in common statistical software packages. Chapter 3 covers basic statistical analyses, data transformations, charts and graphs, and data filters and sub-files. Chapter 4 focus on the development and application of price trends and vacant land models. Chapter 5 focuses on the development of improved residential models. Chapter 6 introduces automated comparable sales models.

Along with problems and illustrations, more than half of the course is based on hands-on labs in which students work through exercises with real world data to answer questions and construct data

transformations, price trends, land and improved residential models, and ratio analyses. The course uses IBM's user-friendly statistical software package, SPSS (Statistical Package for the Social Sciences), the most common statistical software package used by assessors. Follow-up course 334 covers the development of non-residential mass appraisal models. **Recommended: Course 300, *Fundamentals of Mass Appraisal textbook (FMA)*, A solid working knowledge of SPSS - 30 hours CE**

Course 400 - Assessment Administration

Course 400 provides fundamental management concepts for management and supervisory personnel in the assessor's office. The course begins by emphasizing the need for management, and the various roles placed on the assessor and all supervisory personnel. The course then introduces the four major management functions (planning, organizing, directing, and controlling). Although the four functions are interrelated, a separate chapter is devoted to each one. This provides for a greater understanding of the major functions. **Recommended: Course 101, *The Appraisal Foundation's Uniform Standards of Professional Appraisal Practice (USPAP)* and *Assessment Administration textbook* - 30 hours CE**

Course 402 - Property Tax Policy

Course 402 offers students' strategies for assisting in the effective formulation and implementation of tax policies and presents background enabling students to understand the context under which property tax policy is established. Students will be given analytical tools with which they can explain the effects of proposed property tax changes. They will be provided with a sound theoretical basis to guide decision-making and to assist in creating workable solutions for their jurisdictions. The course is designed for assessment administrators and students of taxation, as well as professional policy advisors who guide and make decision in the area of tax policy on a regular basis. **Recommended: *Fundamentals of Tax Policy textbook* - 30 hours CE**

Course 500 - Assessment of Personal Property

The Assessment of Personal Property is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to assess personal property. This course concentrates on the skills necessary for listing, appraising and assessing the market value of properties using the three approaches to value: the cost approach, the income approach and the sales comparison approach. The Assessment of Personal Property utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. The ten sections of the course present a broad mixture of theory and practical application. Exercises are included so the student can test and reinforce new skills. Time is allotted for questions and answers throughout the course. Students are encouraged to participate actively. **Recommended: *Property Assessment Valuation (PAV)* (3rd edition) textbook – 30 hours CE**

Course 600 - Principles and Techniques of Cadastral Mapping

Principles and Techniques of Cadastral Mapping is intended to be a comprehensive, interactive program to introduce entry-level map maintenance personnel and assessment technicians to the field of cadastral mapping. Students are presented basic mapping principles and techniques and are expected to demonstrate basic skills that will allow them to plot deeded descriptions in both the metes and bounds land description system and the Public Land Survey System. Principles and Techniques of Cadastral Mapping utilize lectures, classroom discussion, and exercises to emphasize the main concepts and procedures taught in the course. **Recommended: Course 101 – 30 hours CE**

Course 601 – Cadastral Mapping – Methods & Applications

Cadastral Mapping-Methods and Applications is intended to be a continuation of the mapping science curriculum. It exposes students to aspects of protocol and legal principles that are not covered in Course 600. This course utilizes lectures, classroom discussion and exercises to emphasize the main concepts and procedures taught during the week. **Recommended: Course 101 & Course 600 – 30 hours CE**

Workshop Descriptions

Workshops: Various hours of instruction with optional examinations.

Workshop 100 – Understanding Real Property Appraisal

Understanding Real Property Appraisal is designed to provide the students with a basic understanding of the procedures and techniques used within a mass appraisal office. This workshop introduces students to some of the concepts involved in using two approaches to value: the cost approach and the sales comparison approach. Understanding Real Property Appraisal utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. *IAAO recertification credit: 15 hours-2 days*

Workshop 150 - Mathematics for Assessors

This two-day workshop is designed to provide the student who plans on attending IAAO programs with an understanding of the mathematical concepts and techniques applied in the appraisal and assessment administration disciplines. It is designed for both the beginning student who has limited knowledge of mathematics and those students who wish to refresh their mathematical skills. Topics covered include a review of the basic mathematical functions, negative numbers, decimals, percentages, exponents, roots, mathematical notation, algebra, statistics, and graphs. This workshop includes an exam. Students will be required to provide their own HP12-C calculator for use in the class. *IAAO recertification credit: 15 hours-2 days*

Workshop 151 – Uniform Standards of Professional Appraisal Practice (National)

This workshop covers materials from The Appraisal Foundation, Uniform Standards of Professional Appraisal Practice which includes: Definitions, Preamble, Ethics Rule, Record Keeping Rule, Competency Rule, Scope of Work Rule, Jurisdictional Exception Rule and Standards 1 through 3, and 6 through 10. Supplementary materials include The Appraisal Foundation Uniform Standards of Professional Appraisal Practice (USPAP). This workshop includes an exam. *IAAO recertification credit: 15 hours-2 days*

Workshop 155 - Depreciation Analysis

Depreciation Analysis provides a comprehensive, advanced treatment of the techniques of estimating depreciation of residential property. Through a series of market-oriented case studies and demonstration problems, types of depreciation and generally recognized methods for measuring depreciation are covered, with emphasis on the observed condition method. Depreciation measurements are applied to a single subject property, providing experience in analyzing the advantages and limitations of each method. This workshop includes an exam. *Recommended: Course 101. IAAO recertification credit: 15 hours-2 days AQB Approved: 15 CE*

Workshop 157 – The Appraisal Uses of Excel Software

The Appraisal Uses of Excel Software Workshop provides the participants with practical, hands-on instruction on the use of Excel to accomplish basic appraisal functions. Participants will be required to bring a laptop computer with a 2003 or 2007 version of Excel installed. They will be given a dataset and a student reference manual. The instructor will take them through a series of steps to achieve value estimates for a small dataset using the cost, sales comparison and income approaches to value. Each participant will be allowed to take the completed spreadsheets with them to use in their jurisdictions. This workshop does not include an exam. *IAAO recertification credit: 15 hours-2 days*

Workshop 158 – Highest and Best Use

Highest and best use is a concept in real estate appraisal in which market value is achieved by the reasonably and probable legal land use that results in the highest value. Highest and best use is an essential step in the mass appraisal process and is necessary before market value estimates can be made. Local law may mandate preferential assessments according to specific land uses such as agricultural, historic and so forth rather than the highest and best use. This workshop is designed to

provide students with a more in-depth study and understanding of the role and purpose of highest and best use in the appraisal process. Finally, there will be discussion of the unique situations that sometimes arise in a highest and best use analysis. *IAAO recertification credit: 15 hours-2 days AQB Approved: 15 CE*

Workshop 162 - Marshall & Swift Cost Approach (Residential)

This two-day workshop is designed to teach participants how to utilize the Marshall & Swift Residential Cost Manual. Several case studies are used to enhance the student's ability to apply this information. This workshop includes an exam. *IAAO recertification credit: 15 hours-2 days*

Workshop 163 - Marshall & Swift Cost Approach (Commercial)

This workshop is designed to teach participants how to use the Marshall & Swift Commercial Valuation Guide. Participants will spend more time working several case study problems to assist them in learning how to apply this service. This workshop includes an exam. *IAAO recertification credit: 15 hours-2 days*

Workshop 171 - IAAO Standards of Professional Practice & Ethics

IAAO's "Code of Ethics, Canons and Standards of Professional Conduct" This workshop is designed to provide performance standards for real property, mass, business and personal property appraisal and consulting. Case studies and exercises illustrate the material. This workshop includes an exam. *IAAO recertification credit: 7 hours-1 day*

Workshop 181 – 7-Hour National USPAP Update for Mass Appraisal

This workshop is a National 7-hour USPAP Update offered for continuing education for licensure and certification through The Appraisal Foundation. The workshop provides a general overview of USPAP guidelines, advisory opinions, statements, and other appraisal practices with discussion, illustrations and case studies focused on issues relevant to the daily practice of mass appraisers. The course is updated yearly to address changes to USPAP and common misunderstandings. *IAAO recertification credit: 7 hours – 1 day*

Workshop 191 – Uniform Standards of Professional Appraisal Practice Update (National)

This workshop is the National 7-hour USPAP Update offered for continuing education for licensure and certification through The Appraisal Foundation. The workshop provides a general overview of USPAP guidelines, advisory opinions, statements, and other appraisal practices. The course is updated every two years to address changes to USPAP and common misunderstandings. This workshop does not include an exam. *IAAO recertification credit: 7 hours-1 day*

Workshop 252 -Valuing Property Affected by Environmental Contamination

This workshop is designed for the appraiser who needs to understand how to deal with valuation of contaminated properties. The course is based on the IAAO "Standard on the Valuation of Property Affected by Environmental Contamination." The workshop addresses all of the issues presented in the standard, including: definitions and terminology, types of contaminating substances, effects of technology, factors affecting value, application of the three approaches to value, government regulations, and recent court decisions. Case problems are included to demonstrate principles discussed. This workshop includes an exam. *Recommended: Course 101,102, IAAO recertification credit: 15 hours-2 days*

Workshop 257 – Fundamentals of Industrial Valuation

The workshop covers preparing for the appraisal, the process of visiting the plant, gathering information, etc. It also examines the three approaches to value as they are applied to buildings and to M&E. A variety of core topics are discussed, including an introduction to manufacturing and general information, about industrial processes, that is helpful to the appraisal process. The text includes extensive details about preparing and performing appraisals, and chapters on valuing buildings and structures, land, and machinery and equipment. This workshop includes an exam. *Recommended: Fundamentals of Industrial Valuation textbook, IAAO recertification credit: 15 hours-2 days*

Workshop 260 – Valuation of Agricultural Lands

Agriculture has always played a major role in the development of civilization and this class will provide a good understanding of the various types and uses of land that are classified as agricultural. It will also provide the student with an understanding of the need for some type of preferential assessment, and will discuss historical as well as current land tax policy. The current assessment policies in various states as well as Federal Programs will be explained. Crop types and practices that affect classifications and valuations as well as stocking and carrying capacities will be considered. Methods for describing land and the classification of soils by the Natural Resource Conservation Service (NRCS) as well as understanding soil structures and the textural triangle will be taught. Students will also be shown various methods that can be used in the valuation of agricultural lands. *IAAO recertification credit: 18.5 hours-2 1/2 days*

Workshop 354 - Multiple Regression Analysis for Real Property Valuation

This workshop provides an understanding of the mechanics and application of multiple regression analysis (MRA) in property valuation, as well as instruction in gathering and qualifying data for MRA application. The workshop shows how to develop and use MRA equations as appraisal tools and how to evaluate, using measures of goodness-of-fit and variable importance, the results of an MRA--based practical drill and demonstration problems, and how to follow step-by-step explanations of the MRA process. Although the workshop is open to anyone wishing to acquire a greater understanding of MRA as an appraisal tool, it is particularly valuable for those whose offices are considering using MRA valuation techniques or whose assessments are reviewed by a supervisory agency using MRA. An understanding of both the sales comparison approach and fundamental appraisal statistics is assumed. This workshop includes an exam. *Recommended: Course 101, IAAO recertification credit: 11 hours -1 ½ days*

Workshop 403 – Property Tax Policy Alternatives, Principles & Comparisons

Workshop 403 was customized from Course 402 Tax Policy and includes topics from modules 1, 5 & 7. This workshop will provide an understanding of public and private sector roles, how state and local governments raise revenue, tax abatements and California type control and the roles of property tax assessors in policy. Additional topics discussed include the features of a model assessment system and property tax system, budget and rate driven systems (state & local roles, advantages and disadvantages of current market value as a base for property tax and exemptions & controls on property tax). Issues relating to other taxes and contrasting their use strengths and weaknesses with those of property tax and major legal issues in property tax will be discussed as well. The workshop is designed for assessment administrators and students of taxation, as well as professional policy advisors who guide and make decision in the area of tax policy on a regular basis. This workshop includes an exam. *IAAO recertification credit: 18 hours - 2 ½ days*

Workshop 452 - Fundamentals of Assessment Ratio Studies

This workshop provides a very basic introduction to the development and uses of assessment-sales ratio studies based upon the *IAAO Standards on Ratio Studies: January, 2007*. The workshop covers the topics of sales analysis, sampling, and the development of assessment ratio studies. The workshop also includes material on managerial and technical issues, which include staffing, timing of studies, use of study results, statistical testing, and assessment regressivity and progressivity. *Recommended: Course 101, IAAO recertification credit: 18.5 hours-2 1/2 days*

Workshop 551 – Valuation of Machinery & Equipment

This workshop is designed to provide a formal, systematic, comprehensive program of study for those who assess personal property, specifically machinery and equipment. The very nature of most personal property item provides a challenge in proper valuation – the diversity, mobility or adaptability, and the forces affecting value of personal property frequently make it far more difficult than real property to discover, list and value. The end goal in the appraisal of machinery and equipment is an estimation of market value that is both accurate and equitable. There are three accepted approaches to value. The content of this workshop includes specific application of the three approaches. This workshop includes an exam. *Recommended: Course 500, IAAO recertification credit: 18.5 hours-2 ½ days*

Workshop 552 - Personal Property Auditing, Basic

This workshop provides a foundation for understanding basic financial records. Specifically to be discussed are those records relating to fixed assets. The balance sheet, depreciation schedule, and income statement will be described and discussed in much detail. Emphasis will be placed on the pertinent data relevant to the personal property appraiser. Through a case study, students will demonstrate understanding of how data from financial records connects to the information needed to appraise taxable property. This workshop includes an exam. *Recommended: Course 500, IAAO recertification credit: 18.5 hours-2 ½ days*

Workshop 553 - Personal Property Auditing, Advanced

This workshop expands the understanding of financial records provided in the Basic Personal Property Auditing Workshop and presents advanced discussions of accounting and auditing theory as it relates to fixed assets. Capitalization and expense rules will also be discussed. The use of computers, including spreadsheets will be reviewed. An audit template spreadsheet is provided to students, instruction on its use back home will be covered through a case study. This workshop includes an exam. *Recommended: Course 500 and Workshop 552. IAAO recertification credit: 18.5 hours-2 ½ days*

Workshop 650 - Cadastral Mapping

This workshop introduces assessment mapping and related information. It covers the functions and types of assessment maps, mapping techniques, methods of conveying property rights, base maps, land description systems, work maps, parcel identification, mapping system maintenance, and the use of computers in mapping. Practical exercises illustrate the mapping procedures described in the text. This workshop includes an exam. *IAAO recertification credit: 15 hours-2 days*

Workshop 651 - Geographic Information Systems for Assessors

GIS for Assessors is an introductory workshop in the IAAO's Mapping Science Curriculum. This workshop employs a lecture and PowerPoint presentation to illustrate the main concepts of GIS within the scope of assessment administration. If you already have GIS, it is the author's intention that this course leaves you thinking about how you currently use your system and consider possible new uses that will make you more productive at your job. If you do not have a GIS, this course provides the knowledge to get started. This workshop includes an exam. *IAAO recertification credit: 15 hours-2 days*

Workshop 850 – CAE Case Study Review Workshop

This workshop provides a comprehensive review and case study for the valuation of commercial property. Participants are to have had at least the basic appraisal courses and have experience in the appraisal of residential property. This is not an introductory workshop.

The workshop is approximately 25% lecture and 75% problem solving. There are seven sections consisting of: General Appraisal, Land Valuation, Cost Approach, Depreciation, Sales Comparison Approach, Gross Rent Multiplier and Ratio Studies and Statistics. During the final four hours of the workshop, the students will take a practice case study followed by approximately one-hour of reviewing the case study solutions. The practice case study has fifty questions and ten pages of narrative about the subject jurisdiction and subject property. There is no graded exam. *IAAO recertification credit: 18.5 hours-2.5 days*

Workshop 851 – RES Case Study Review Workshop

This workshop provides a comprehensive review and case study for the valuation of residential property. Participants are to have had at least the basic appraisal courses and have experience in the appraisal of residential property. This is not an introductory workshop.

The workshop is approximately 25% lecture and 75% problem solving. There are seven sections consisting of: General Appraisal, Land Valuation, Cost Approach, Depreciation, Sales Comparison Approach, Gross Rent Multiplier and Ratio Studies and Statistics. During the final four hours of the workshop, the students will take a practice case study followed by approximately one-hour of reviewing the case study solutions. The practice case study has fifty questions and ten pages of narrative about the

subject jurisdiction and subject property. There is no graded exam. *IAAO recertification credit: 18.5 hours-2.5 days*

Workshop 852 – AAS Case Study Review Workshop

This workshop covers topics from the various required courses for the AAS Designation. Topics will include: assessment administration (budgeting and planning), the three approaches to value (cost, sales comparison, and income)

the economic principles of appraisal, highest & best use, time & physical characteristic adjustments, aspects of appraisal accuracy (levels of appraisal and uniformity), calculations of statistical items such as the median, mean, coefficient of dispersion (COD), & standard deviation, tax policy issues and Uniform Standards of Professional Appraisal Practice.

There will also be questions that deal with individual appraisal and assessment administration issues. During the final four hours of the workshop, the students will take a practice case study followed by approximately one-hour of reviewing the case study solutions. The practice case study has fifty questions and approximately 14 pages of background information. There is no graded exam. *IAAO recertification credit: 18.5 hours-2.5 days*

Workshop 854 - CMS Case Study Problem Review

This workshop provides a comprehensive review of the methods and applications of cadastral mapping. Participants are to have had IAAO's two mapping science courses and experience in cadastral mapping. This is not an introductory workshop.

There are three sections consisting of: Geometry of the Description, Public Land Survey System, and Rules for Construction of the County Cadastre. Students will be exposed to typical mapping scenarios that they will encounter in the Cadastral Mapping Specialist (CMS) case study. Each exercise is followed by a discussion of the solution. The workshop is approximately 30% lecture and 70% problem solving. There is no graded exam. *IAAO recertification credit: 15 hours-2 days*

Instructor Procedures

Instructor Criteria as Approved by Executive Board

The Criteria for Instructor Selection, Qualifications, Evaluations and Conduct Guidelines states the qualifications for instructors of IAAO courses and workshops.

All IAAO instructors are members of the Association. An IAAO Instructor can be an In-state, Regular, Specialty, Senior or Senior Specialty Instructor.

I. Selection

All applicants for instructor status are required to submit a detailed application to the Professional Development Department at the IAAO Headquarters. Prior to attending an IAAO ITW, each applicant must present proof of satisfying at least one of the following requirements: All applications must be accompanied by a full resume/bio.

- A. A bachelor's degree in any field and five (5) years of experience directly related to the subject matter to be taught.
- B. A master's degree in any field and five (5) year of experience directly related to the subject matter to be taught.
- C. A master's or higher degree in a field that is directly related to the subject matter to be taught; five (5) year of experience directly related to the subject matter to be taught.
- D. Five (5) years of real estate appraisal teaching experience directly related to the subject matter to be taught. In order to qualify as teaching experience the courses/seminars/workshops, ODF taught must meet at least one of the following minimum requirements.*
 1. Course/seminar is approved by the AQB Course Approval Program.
 2. Course/seminar is approved by a US state or territory for state appraisal licensing/certification credit.
 3. Course is taught through an accredited college or university.
 4. Course/seminar is approved for credit through an established professional appraisal organization, state assessor or appraiser agency.

*Distance education courses are not applicable for use as teaching experience.

- E. Five (5) years of specialty teaching (cadastral mapping or assessment administration) experience directly related to the subject matter to be taught.
- F. Seven (7) years of real estate appraisal experience directly related to the subject matter to be taught.
- G. Seven (7) years of specialty experience (cadastral mapping or assessment administration) experience directly related to the subject matter to be taught.

One year of appraisal experience is defined as:

1. A calendar year where the individual spent a majority (more than 50%) of their professional time appraising real property, personal property, or businesses and
2. Derived a significant portion of their income from performing (real property, personal property, or business valuation) appraisal services.

One year of specialty experience is defined as:

1. A calendar year where the individual spent a majority (more than 50%) of their professional time in cadastral mapping or assessment administration and
2. Derived a significant portion of their income from performing (cadastral mapping or assessment administration) appraisal services.

All applicants for instructor status are required to submit a detailed application to the Professional Development Department at the IAAO Headquarters. Existing instructors must have such application on file. All applicants must be IAAO members.

Prior to attendance at and participation in an IAAO Instructor Training Workshop (ITW), each applicant's application will be reviewed by the Professional Development Department. Any applicant whose application reveals they have insufficient appraisal/assessment/specialty education and/or experience may be rejected.

Each applicant coming before the IAAO Instructor Relations sub-committee of the Professional Development Committee will have attended an IAAO ITW. At the ITW, each applicant will have successfully completed a short oral presentation demonstrating his/her knowledge of appraisal/assessment and his/her ability to effectively teach such material.

II. Qualifications

The following will constitute the progression of IAAO instructors:

Trainee - a trainee instructor will have successfully completed an IAAO ITW. All trainee assignments must be arranged by IAAO staff. Upon acceptance of the applicant by the Instructor Relations sub-committee, the trainee instructor must teach his/her first course on a course from the tract taken at the ITW with an approved IAAO senior instructor or senior specialty, as appropriate, if they want to instruct nationally. The trainee will be expected to teach approximately 10 hours of a course; however, no trainee will be allowed to teach on the afternoon of the day preceding the exam. The senior instructor will rate the trainee on his/her performance during the training assignment and furnish an evaluation report to the Instructor Relations Sub-Committee. Upon review of the evaluation by the Instructor Relations Sub-Committee, the trainee may be granted regular instructor status. No trainee will be granted regular instructor status that has not met the following requirements.

- a) Successful completion of an ITW, and
 - b) Passed a training assignment under a senior or senior specialty instructor, in a state/province other than the state/province of residence of the trainee, and
 - c) A candidate for an IAAO designation
 - d) Be an IAAO member in good standing
- ❖ If the trainee does not complete item c above within two (2) years, they will be suspended, and may only instruct as an In-State instructor until they obtain their designation.

In-State Instructors - are limited to teaching within their state/province, and will have met the following requirements:

- a) Successful completion of an ITW
- b) Successfully completed (attended at least 50 minutes of each 60 minutes of instruction and passed the final examination) or served as either author or reviewer

of the IAAO Course or Workshop they wish to instruct. Equivalent education and examination challenges do not substitute for this requirement.

c) Be an IAAO member in good standing

- ❖ In-State instructors will be required to prove requirements a) and b) listed above with every application to instruct a course/workshop. In-State instructors may only instruct IAAO programs that are conducted on a “certified” basis.

Regular Instructor - a regular instructor will have completed the requirements for a trainee instructor and additionally met the following requirements:

- a) Obtain an AAS, CAE, CMS, PPS, or RES designation within two years of becoming a regular instructor. The two years shall run from December 31st of the calendar year of the year the regular instructor status was obtained
- b) Any instructor not obtaining an IAAO designation within the defined time frame, will be suspended, and may only instruct as an In-State instructor.
- c) Successfully completed (attended at least 50 minutes of each 60 minutes of instruction and passed the final examination) or served as either author or reviewer of the IAAO Course or Workshop they wish to instruct. Equivalent education and examination challenges do not substitute for this requirement.

- ❖ Exception to the above guidelines is as follows: Instructors who are close to completing their designation by their candidacy completion date (but have not actually finished) may apply to the Instructor Relations sub-committee for a short extension of time. The application for an extension must be mailed to the Director of Professional Development and must be received prior to the expiration of the two-year period.

Specialty Instructor – a specialty instructor will have met the requirements for a regular instructor and additionally meet the following requirements:

- a) Hold an AAS, CMS, PPS or RES designation
- b) Be an IAAO member in good standing

There will be four classes of specialty instructors:

1. AAS Designee will be called a Senior Assessment Administration Instructor: Eligible to teach Course 400 and 402 and any Assessment Administration workshops, such as 403 and 452.
2. CMS Designee will be called a Senior Mapping Instructor: Eligible to teach any Mapping courses and workshops. Courses 600 & 601 and Workshops 650 & 651.
3. PPS Designee will be called a Senior Personal Property Instructor: Eligible to teach all Personal Property courses and workshops. Course 500 and Workshops 551,552 and 553.
4. RES Designee will be called a Senior Residential Instructor: Eligible to teach Courses 101,102, 201 and Workshops 155 and 252.

Senior Specialty Instructor - a senior specialty instructor will have met the requirements for a regular instructor and additionally meet the following requirements:

- a) Hold an AAS, CMS, PPS or RES designation

- b) Have completed three teaching assignments as a regular instructor
- c) Be an IAAO member in good standing

There will be four classes of senior specialty instructors:

1. AAS Designee will be called a Senior Assessment Administration Instructor: Eligible to teach Course 400 and 402 and any Assessment Administration workshops, such as 403 and 452.
2. CMS Designee will be called a Senior Mapping Instructor: Eligible to teach any Mapping courses and workshops. Courses 600 & 601 and Workshops 650 & 651.
3. PPS Designee will be called a Senior Personal Property Instructor: Eligible to teach all Personal Property courses and workshops. Course 500 and Workshops 551, 552 and 553.
4. RES Designee will be called a Senior Residential Instructor: Eligible to teach Courses 101,102, 201 and Workshops 155 and 252.

If a senior specialty instructor successfully completes an ITW outside of their designation, they will be added to the In-State Instructor list for the courses/workshops completed in the ITW and for their specialty courses/workshops.

Senior Instructor—a senior instructor will have met the requirements for a regular instructor and additionally meet the following requirements:

- a) Hold a CAE designation
- b) Have completed three teaching assignments as a regular instructor

III. Conduct

- A. During teaching assignments, instructors must conduct themselves with integrity. They should maintain an appropriate professional relationship with students attending IAAO courses, both in and outside the classroom.
- B. It is the policy of IAAO to promote a positive learning environment for all students. Harassment and/or discriminatory behavior directed toward a person because of his or her race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information is expressly prohibited. Instructors are obligated to refrain from such behavior and are required to discourage such behavior from occurring in the classroom by others.
- C. While in the classroom, only IAAO approved material should be discussed.
- D. Instructors wishing to set up special sessions for review should do so only in a public classroom or public meeting room.

IV. Maintaining Instructor Status

- A. All instructors, including in-state, regular, senior, & senior specialty instructors, must maintain their IAAO membership in good standing.
- B. All national instructors, regular, senior, & senior specialty instructors, must maintain their IAAO designation.
- C. All instructors, including in-state, regular, senior, & senior specialty instructors, must instruct an IAAO course/workshop/One Day Forum at least once in a period of three consecutive years. If an instructor does not meet this “three consecutive years” requirement, they will be removed from active instructor status until which time they attend and pass another ITW, in its entirety. For One Day Forum (ODF) instruction, the instructor must distribute IAAO’s evaluation form and provide the completed evaluations to IAAO Headquarters, Professional Development.
- D. All instructors, including in-state, regular, senior, & senior specialty instructors, are required to attend an Instructor Meeting at the annual conference or participate in an Instructor Meeting Webinar at least once every three years. If an instructor does not meet this requirement, they must either attend an Instructor Meeting at the annual conference or participate in an Instructor Meeting Webinar to regain his/her status of active instructor.
- E. There is no tenure for IAAO instructors. Reappointment depends on continued good teaching in the classroom and good standing with IAAO

The Director of Professional Development is allowed to approve a Senior Instructor to teach courses for which he/she has not attended an ITW. This would be allowed when there has been revisions or updates to the course/workshop, but not when the course/workshop has been a rewrite.

Revision When material has been corrected to account for errors such as mathematical, grammar and formatting.

Update When material has been changed or modernized to reflect more current procedures or value estimates.

Rewrite When material has been substantially changed. A course/workshop will be considered as a rewrite when a contract has been issued by IAAO or IAAO has requested the material be rewritten. The contract can be on a fee or volunteer basis and would include any new courses/workshops. When an existing course or seminar is a “re-write” of the material, the developer or developers may present the instructor rollout.

When there is a rewrite of a course/workshop, ALL instructors (In-state, Regular, Senior and Senior Specialty) must take and pass the student exam with a grade of 70% or higher, take and pass the instructor exam with a grade of 80% or higher and meet one of the following options to become certified on the new material:

1. Attend an ITW on the course/workshop.

2. Audit the course/workshop at no charge.
3. Attend a course overview at the next IAAO Annual Conference following the rewrite.
4. Attend a Local Review: The IRSC approved regional half-day sessions, much like that those held at the annual conference. These can be offered by local chapters or state coordinators and are instructed by previously certified instructors.
5. Participate in a Webinar review of the updated course materials.
6. If changes in a rewrite are significant enough that the course materials cannot be adequately covered with the above options, the IRSC may require instructors to audit the course/workshop, at no charge, in order to become approved.

New IAAO Curriculum - When IAAO develops a course or workshop that is not already in its curriculum, the developer or developers of the course or workshop will conduct the rollout of the material. In the instances when the Education Sub-Committee has approved a new course or workshop, the Education Sub-Committee will designate the rollout presenter and notify the Instructor Relations Sub-Committee (IRSC) and the IRSC liaison of who the party is. New contracts by IAAO for new course development & workshops should address these requirements.

Instructor's qualifications for "new IAAO curriculum" as defined under the heading *New IAAO Curriculum*: An existing IAAO instructor can qualify to teach new IAAO curriculum by meeting any one of the below four requirements. The exam may be taken after the training or proctored according to IAAO rules and procedures. IAAO will provide the proctored exam at cost (expenses only) for each instructor attending the course overview, local review or webinar. Instructors have 12 months from the date of public notice on the IAAO website that a new course or workshop has been developed to meet one of the below requirements. If the instructor does not do so within this time frame, the instructor must attend and pass the exam for the course or workshop.

1. Attend an ITW on the new course/workshop and pass the student final exam with a grade of 70% or higher and the instructor exam with a grade of 80% or higher.
2. Attend a course overview at the next IAAO Annual Conference following the course development and pass the student final exam with a grade of 70% or higher and the instructor exam with a grade of 80% or higher.
3. Attend a Local Review by an already qualified instructor in the material and pass the student final exam with a grade of 70% or higher and the instructor exam with a grade of 80% or higher.
4. Participate in a Webinar review of the new course/workshop and pass the student final exam with a grade of 70% or higher and the instructor exam with a grade of 80% or higher.
5. If the new course is such that the course materials cannot be adequately covered with the above options, the IRSC may require instructors to audit the course/workshop, at no charge, in order to become approved and pass the student final exam with a grade of 70% or higher and the instructor exam with a grade of 80% or higher.

The Director and/or the Instructor Relations Sub-Committee also have the right to rescind such decisions if deemed appropriate.

V. Evaluations

The Director of Professional Development shall review all instructors annually.

- A. The IAAO Procedural Rules require that the Instructor Relations Sub-Committee train, coordinate, and monitor the quality of the instructor cadre. This “monitoring” takes place in the form of an annual overall performance rating.
- B. The Instructor Relations Sub-Committee has determined that all instructors will be evaluated based upon their student evaluations and pass rates in relation to the National Course Average. The normal acceptable range is determined by using +/- 1.5 standard deviation from the National Course Average. Any significant comments brought to the attention of the Professional Development Department staff from students, Education Coordinators and/or instructors will be included in the evaluation. By highlighting these comments we encourage the instructor to take appropriate action to remedy any problem.
- C. The Instructor Relations Sub-Committee may conduct evaluations, other than annually, in response to complaint(s) on an instructor. Before an evaluation is conducted, the Instructor Relations Sub-Committee will review the complaint(s) and determine if the complaint(s) merits any further review.
- D. If the Instructor Relations Sub-Committee does an evaluation resulting from a complaint(s), the following guidelines will be used:
 1. Instructor Relations Sub-Committee may conduct a conference call with the complainant(s) or conduct a follow-up by written correspondence to confirm the details of the complaint(s).
 2. The Instructor Relations Sub-Committee may conduct telephone interviews from randomly selected participants in the course/workshop relating to the complaint(s).
 3. The Instructor may be sent a written copy of the complaint(s) but names of the complainant(s) will be omitted. The instructor will have ten (10) days to respond back to the Instructor Relations Sub-Committee or request a conference call with the committee.
 4. The committee may review all the information and can take one of the following actions with the complainant(s) and instructor being notified in writing.
 - a) No action needed.
 - b) Written reprimand to the instructor. This would be a result of an improper action, not following IAAO policies and procedures, etc. The reprimand would be placed in the instructors file.
 - c) Written reprimand and require the instructor to recertify by attending an ITW before instructing again.
 - d) Instructors with significant problems may be asked to meet or can request to meet with a review committee comprised of the Chair of the Instructor Relations Sub-Committee and at least two Senior Instructors not currently on the IRSC. Failure of the instructor to follow any actions by the Instructor Relations Sub-Committee or the review committee could result in the removal of instructor status.

- e) The Instructor Relations Sub-Committee (IRSC) shall appoint an education counseling subcommittee composed of at least two senior instructors that are not currently on the committee and the chair of the IRSC.

- E. The IAAO Director of Professional Development will annually report to the Instructor Relations Sub-Committee on the status of all active IAAO instructors, including an evaluation of all approved active instructors.

- F. This evaluation will consider the student evaluations, school coordinator evaluations of the instructors, as well as the personal evaluation by the IAAO Professional Development Director. Also, pass rates are reviewed in relation to the National Course Average. The normal acceptable range is determined by using +/- 1.5 standard deviation from the National Course Average. Poor instructor performance may result in either temporary or permanent suspension of instructor status. The evaluation scheme is to be developed by the Director of Professional Development.

- G. Any instructors serving on the Instructor Relations Sub-Committee will be evaluated by the Chair of Professional Development or any representative from the Professional Development Committee the Chair appoints.

- H. The IAAO Instructor Relations Sub-Committee shall review existing guidelines biennially. The guidelines should include provisions for an annual review of the instructor evaluation process.

- I. This model for ongoing instructor evaluation and review is not to be construed to limit the "on the spot" immediate action of the Director of Professional Development or Instructor Relations Sub-Committee to prevent damage to the integrity or reputation of the IAAO education system.

VI. Honorariums

IAAO instructors shall be paid an honorarium at the approved rate schedule effective January 1, 2016 (see below). Sponsors (Coordinators) are free to pay any negotiated compensation with an instructor for certified courses and workshops.

Flat fee for Senior Instructors:

- \$1,500 – One-Day Forum/Workshop
- \$2,350 – Two-Day Workshop
- \$2,750 – Two ½-Days Workshop
- \$3,050 – Three-Day Workshop
- \$3,800 – Four-Day Workshop
- \$4,250 – Five-Day Course

Flat fee for Regular Instructors:

- \$1,150 – One-Day Forum/Workshop
- \$1,900 – Two-Day Workshop
- \$2,000 – Two ½-Days Workshop
- \$2,350 – Three-Day Workshop
- \$2,650 – Four-Day Workshop
- \$3,200 – Five-Day Course

Expense Reimbursement

IAAO does not reimburse expenses for instructors. All personal expenses (travel, hotel, meals, etc.) must be paid for by the instructor.

Instructor Training Workshop

The Instructor Training Workshop (ITW) is an intensive 3-day interactive workshop. The ITW is not intended to teach individuals how to instruct but rather to evaluate participants' ability to teach IAAO material in a classroom setting.

During this 3-day workshop, students learn about IAAO education delivery, adult education, effective communication, and IAAO curriculum. Each student is expected to understand the general subject matter and specific course material, spend at least 10 hours in advance preparation, prepare short practice presentations, and prepare one final ten-minute presentation. Students demonstrate (and are evaluated on) their teaching style, classroom presence, familiarity and comprehension of the course material, organization of subject matter, and clarity and accuracy of their classroom presentation.

If the student does not pass the ITW, he/she will receive specific feedback from the ITW Instructor panel and is welcome to attend a future ITW, at their own expense. The ITW Instructor panel's decision is final.

Each ITW may consist of all or part of the various sessions below and shows the courses/workshops that the participants could teach when successfully completing that session.

<u>Session</u>	<u>Courses/Workshops</u>
Course 101	101,102, 201,100,155
Course 300	300,311,312
Course 400/402	400, 402,403
Course 500	500, 551, 552, 553
Course 600/601	600,601,650,651

Trainee Assignments

After successfully completing the ITW, instructors will be classified as IAAO Trainee Instructors (if their desire is to instruct nationally). The Trainee Instructor must teach his/her first course on a course from the tract taken at the ITW with an approved IAAO Senior or Senior Specialty Instructor, as appropriate. All trainee assignments must be arranged by IAAO staff. Trainees will be expected to teach at least 10 hours of a 30-hour course. No trainee will be allowed to teach on the afternoon of the day preceding the exam.

The Trainee will receive an Instructor Trainee Comment Form from IAAO. This form will be used for comments about their teaching experience. The Senior Instructor will function as an instructor of the Trainee and as an evaluator. The Senior Instructor will complete a Trainee Evaluation Form. Specific information about the Trainee and about the procedures for overseeing and evaluating the Trainee will be given to the Senior Instructor prior to the course. Trainees do not receive an honorarium however; travel, hotel and food will be reimbursed by IAAO if the trainee assignment is completed within 3 years of their initial ITW completion. The maximum expense reimbursement is \$1,000 and subject to IAAO Expense Reimbursement policy.

Choosing an Instructor

When you are ready to choose an instructor you can call the IAAO Education Manager to get a listing of Instructors by classification (Senior, Senior Specialty, Regular, or In-State) and by courses that they are approved to teach. A list of differences of classifications is found in the Instructor Criteria Section of the handbook. Once an instructor is selected it is the responsibility of the Coordinator to contact the Instructor and work out the details of the assignment (date, number of students, lodging, transportation, fees, and expectations).

Responsibility to the Instructor

The Instructor is the most important key to your program being a success. In order to ensure your program's success you should follow these guidelines in working with the instructor.

- I. Determine the fee (see paragraph entitled "Instructor Fees")
- II. Send contract (see attachment #5)
- III. Determine whether instructor needs assistance with travel arrangements
- IV. Work with Instructor to set lodging needs
- V. Determine classroom setup and be sure that the Instructor's needs are being met
- VI. Determine Instructor's A.V. requirements (if acetates are being used an overhead projector and screen must be available, if power point is being used an LCD projector and screen must be available).
- VII. SRM disbursement, does the instructor want to hand out SRM's in class or should they be disbursed at registration

Instructor Fees

When conducting a Certified Program the Instructor honorarium is the responsibility of the sponsoring agency. Negotiations of honoraria and travel expenses are between the agency and the Instructor. When conducting a Contract Program, IAAO does not reimburse for travel expenses and pays the instructor a flat fee dependent on the instructor's status.

State Appraisal Certifications

Effective 1/1/08, The Professional Development Department will no longer submit course approval applications and associated materials to each state for pre-licensing or continuing education approval. The Professional Development Department will, in the future, submit our courses to the AQB Course Approval Program (CAP) for approval.

Advertising

IAAO will promote all programs scheduled *at least two months* in advance of the program, through the IAAO *Fair & Equitable*, *Assessment Journal*, web page and website.

Fair & Equitable is a monthly magazine published for members of IAAO. It includes association information and timely career and course listings. *Fair & Equitable* is mailed on approximately the 20th of each month to all 7,500 members free of charge.

Ordering Materials

Textbooks

Students will have assigned readings from one of the following textbooks for all IAAO 30- hour courses. Typically, no textbooks are required for IAAO workshops.

Property Assessment Valuation, 3rd edition, 2010

An introductory textbook that will support courses 101, 102 and 201. An introductory text on assessment administration and basic appraisal principles for all training needs. Contains substantial chapters on mapping, highest and best use, and personal property assessment.

Property Assessment Valuation, 2nd edition, 1996

An introductory textbook that will support courses 112 and 500. This book provides the best treatment of the basic principles of appraisal and has many examples of single-property appraisal. It also contains substantial chapters on personal property valuation, mapping, and a basic survey of mass appraisal and statistics for mass appraisal.

Assessment Administration, 2003

This book covers the three pillars of IAAO: administration, tax policy, and mass appraisal processes that will support course 400. It provides the information needed to set up and manage a successful assessor's office and understand basic principles of an ad valorem system. Topics covered in this text include an overview of property tax systems, basic approaches to management, overview of different types of property, technology-based information systems, and practical approaches to the perform the tasks required of an assessor's office.

Fundamentals of Mass Appraisal, 2011

This textbook has a comprehensive treatment of mass appraisal, which is covered in the 300 series of the IAAO curriculum. This essential tool for mass appraisers replaces and updates the previous Mass Appraisal of Real Property. If you are using automated valuation models, or mass appraisal, you need to understand the principles developed in this textbook. This volume contains everything you need to know to develop a mass appraisal system, build and calibrate models, and conduct a revaluation.

Fundamentals of Tax Policy, 2008

Fundamentals of Tax Policy explores the concepts and philosophy of taxation, the underlying systems for taxation, and the effects of taxation, thus offering insight into current tax policy debates. The book presents a broad overview of general tax policy with an emphasis on property tax policy and supports course 402.

Shipping Materials/Final Count

IAAO will assume a one-time charge based on the enrollment estimate given by the agency at least fifteen days in advance of the first day of the program. The shipping manager will call to confirm the final count of students fifteen days prior to the program start date. If additional material is to be shipped by IAAO as a result of the underestimate of enrollment by the agency, after the fifteen day deadline, the agency agrees to the necessary freight charges which may be incurred by IAAO in order to ensure timely arrival of material. IAAO will fax the agency a shipping inventory sheet which will list the number of boxes sent, contents of the boxes, date shipped and method of shipping used.

Materials to expect one week prior to Program date:

Shrink wrapped Student Reference Manuals and accompanying IAAO binders
Shrink wrapped Textbooks that have been ordered
EEP (contents explained below)

Exam/Evaluation Packet (EEP)

The coordinator should give the EEP to the instructor before the beginning of class. An instructor who does not receive the EEP should obtain it from the Education Coordinator.

The EEP is secured by security labels. Upon receipt of the EEP, the instructor should check to see that the labels are intact. If the label has been tampered with, the instructor should immediately check the examination packet inside. If it appears that the examinations have been tampered with, the instructor should immediately call the IAAO Professional Development Department.

A UPS mailing envelope is included in the EEP for the return of exam materials at the conclusion of the class. Instructors will have to open the EEP on the first day of class to distribute the Education Record Scanner Forms to the students, and to count the examinations to verify the number indicated on the Examination Security Form.

The EEP should always be in the possession of the instructor and should not be turned over to the Education Coordinator for safekeeping. The instructor should see that the EEP is properly returned to IAAO and should not entrust this responsibility to the Education Coordinator.
NOTE: ALL Exams must be returned to IAAO headquarters.

Material found in the EEP includes:

- I. Examination Security Form
- II. Final Examination Booklets
- III. Logistical Report / Instructor Comment Form
- IV. Student Attendance Sheets
- V. Education Record Scanner Forms
- VI. Uniform Request for Recertification Forms
- VII. Instructor/Course Evaluation Scanner Forms
- VIII. IAAO Promotional Material

Examination Security Forms

To ensure accurate accounting of all IAAO examinations this form must be completed. There are three sections to this form.

The top section of the form is completed at IAAO. It indicates the school date and location, school number, course name, instructor and the number of examinations shipped.

The middle section is completed during the first day of the course by the instructor. Upon receipt of the EEP, the instructor should count the examinations received from the Education Coordinator and indicate this number and sign the form.

The bottom section is completed by the instructor after the final examination session and placed on top of the examinations before the EEP is returned to IAAO. The instructor should note the following:

- A. The examination starting time and date
- B. The time the last student completes the examination.

- C. The number of examinations placed in the EEP for return to the IAAO. This number MUST equal the number originally received. A written explanation must be included with the packet if the number is not the same.
- D. The number of students taking the examination, the number of students who did not take the exam, and the total number of students in the program.

Final Examinations

Final examinations for IAAO courses have been developed by the IAAO Professional Development Department under the guidance of the IAAO Education Sub-Committee. The validity of the examinations depends on security precautions that prevent them from falling into unauthorized hands. IAAO depends on its instructors and proctors to take precautions and follow the specified procedures to maintain security.

There will be one examination for each student. Final examinations should not be duplicated for any reason. No student should be issued an examination unless they are properly registered for the program. The instructor ensures that all examination booklets, scratch paper, and education record forms are turned in, whether used or unused.

The instructor is the only individual authorized to administer the final examination and should not delegate this responsibility to any unauthorized individual. The instructor should not retain a copy of the examination.

Requests for Manual Grading

While IAAO stands behind the quality of their exam scoring process, the option is available to students to request a manual re-grade. There is a processing fee of \$50.

IAAO Policy Statement on Cheating

IAAO seeks to support and promote qualities of academic honesty and personal integrity in all aspects of promoting innovation and excellence in property appraisal, assessment administration, and property tax policy through professional development, education, research, and technical assistance. IAAO instructors/proctors are authorized to promote and ensure qualities of academic honesty and personal integrity when in the performance of their duty.

Academic Dishonesty Defined: Serious offenses against the IAAO learning community include cheating, plagiarism, and all forms of academic dishonesty. Cheating or academic dishonesty is defined as the deception of others about one's own work or about the work of another. Specifics on this policy and how it impacts your responsibilities can be found in the IAAO Policy Statement on Cheating.

After The Program

Returning Materials

When the program is over, unused Student Reference Manuals (SRMs) and textbooks, due to student cancellation or an over estimate of needs, may be returned to the IAAO. All materials must be returned in original, like-new, resalable condition. Effective with July 2014 classes, all returns over the allotted 5 items (SRMs or textbooks) will be subject to a 10% Restocking /Administrative Fee. If unused SRMs are not returned to IAAO, the agency will be billed for the original number of SRMs at the per student rate (i.e. \$250 per SRM as each SRM is considered a student attending the program). A Return Materials Request Form will accompany the course materials. This form should be completed in full and sent along with unused materials to IAAO.

Returning the Exam/Evaluation Packet (EEP)

After the exam, the instructor should make sure that all examination booklets and scanner forms have been returned. The material returned to IAAO in the EEP should include:

- I. All completed and unused scanner forms and acetates (Place in plastic folder, when provided or rubber band all exam scanner forms between two pieces of cardboard.)
- II. All used and unused exam booklets
- III. Instructor / Course Evaluation Scanner Forms in sealed envelope
- IV. The Examination Security Form signed by the instructor
- V. The Instructor School Logistical Problem / Instructor Comment Form signed by the instructor
- VI. The attendance sheets
- VII. If completed, the Suspected Academic Dishonesty Form
- VIII. Any complete or unused membership application forms

Please note: any leftover solution pages may be destroyed at the class site.

The EEP will contain a UPS shipping envelope and printed return form. The instructor should mail the EEP from the school and not carry it home. The instructor should ensure that the EEP is properly shipped to IAAO and cannot entrust this responsibility to the local Education Coordinator.

Billing

Invoices will be billed based on the number of students that attended the course, regardless of whether or not a final examination was taken. The actual count of students will be based off of the number of SRM's sent minus those that are returned with the Return Material Request (see attachment #6). All returns over the allotted number of 5 items (SRMs or textbooks) will be subject to a 10% Restocking/Administrative Fee. In order to ensure accurate billing, prompt return of materials is requested along with an accurate billing address.

Student Information

Examination Processing

Upon receipt of the EEP, examination processing will begin. Depending upon the number of courses being offered, examination processing turn-around times may vary. At a maximum, results should be sent to the student no longer than four to six weeks after the EEP is received. Please note: it is imperative that you return the EEP to IAAO immediately after the course is completed. To expedite this process, the UPS packet is prepared by IAAO for ground return shipping service.

Please do not guarantee a specific date when students should expect to receive their exam results. Typically, results are mailed to the participants within four to six weeks after the program. In addition, do not encourage students to call the IAAO office to find out their score. Professional Development Department policy is not to release scores over the phone or via email.

Examination Report and Certificates

A Pass/Fail list will be emailed to the Coordinator within 45 days upon completion of the course. Students who have completed an examination for a course or workshop will receive an examination report. The examination report will list the number of possible points in each exam category and the number of points incorrect in each category.

Seventy percent is the minimum passing score on all exams except for Workshop 151 – National USPAP (2016-2017), which is 74%.

A new attendance policy, adopted by the Education Sub-Committee, went in to effect April 1, 2010. The policy states that students must attend 90% of the class hours to achieve the full number of educational hours offered for the course. Anything less than 90% attendance will result in zero hours of credit.

Students who have successfully completed a course will receive a Certificate of Completion and an associated grade report. Students failing or not taking the examination for a course will receive a Certificate of Attendance if they have met the full attendance policy.

Students who have failed the examination will also receive an application for special examination (re-examination) along with their examination report.

Students who have successfully completed a workshop with an examination will receive a Certificate of Completion and an associated grade report.* Students failing or not taking the examination will receive a Certificate of Attendance.

** Workshop 151- National USPAP results will not include a grade report as The Appraisal Foundation directives are to provide pass/fail results only. Full attendance is required to receive a certificate of completion.*

All students completing a workshop with no associated exam will receive a Certificate of Attendance, if they have met the full attendance policy.

The certificates will be personalized with the student's name, course name, number of hours and date the course was offered. The student's name will appear exactly as it was completed on the pink scanner form so an accurate entry is imperative.

IAAO Recertification Credit

Every IAAO offering has IAAO recertification credit hours assigned to it. These hours are used by IAAO professional designees to receive credit towards their recertification cycle. Each week long course is worth 30 IAAO recertification hours of credit. Credit hours for workshops vary depending upon the length of the workshop.

State Appraisal Board Licensing/Continuing Education Credit

Effective 1/1/08, The Professional Development Department will no longer submit course approval applications and associated materials to each state for pre-licensing or continuing education approval.

The Professional Development Department will, in the future, submit courses to the AQB Course Approval Program (CAP) for approval. Current listings of AQB approvals, as of 03/01/15 are listed below:

Course Number and Title	QE hours*	CE hours*	Expiration Date
101-Fundamentals of Real Property Appraisal		33.50	7/6/17
102-Income Approach to Valuation	33.50	33.50	7/6/17
112- Income Approach to Valuation II	33.50	33.50	8/26/17
155-Depreciation Analysis		15.00	7/18/17
158-Highest & Best Use		15.50	3/3/19
201-Appraisal of Land		33.50	7/14/17
300-Fundamentals of Mass Appraisal		33.50	10/1/18
331 – Mass Appraisal Practices and Procedures		33.50	3/18/18
332 – Modeling Concepts		33.50	9/13/19
909-The Appraisal of Commercial Properties in a Declining Market		7.50	3/25/19
917-How to Critique an Appraisal		7.50	9/9/18
962-Marshall & Swift Commercial Square Foot Method		7.50	3/25/16

*QE/CE Hours listed assume the exam was taken

Requests for Manual Grading

Effective November 1, 2002 IAAO introduced a new Manual Grading Policy. While IAAO stands behind the quality of their exam scoring process, the option is available to students to request a manual re-grade. There is a processing fee of \$50.

Staff Directory

Further information about publications, membership services, educational programs, professional designations, and requirements for membership may be obtained by writing IAAO, 314 W. 10th Street, Kansas City, MO 64105 or calling 816-701-8100.

We may also be reached by e-mail at education@iaao.org or through our Internet home page at IAAO.org. Every IAAO staff member has an individual e-mail address. You may e-mail as follows: lastname@iaao.org (for example, spiegel@iaao.org).

The IAAO office hours are 8:00 a.m.–5:00 p.m. CST.

General IAAO Office	816-701-8100
Toll-free number	800-616-IAAO (4226)
General IAAO Fax	816-701-8169
Internet:	IAAO.org

If you have any questions about the information contained in this handbook, please call the IAAO Professional Development Department.

Curriculum Manager	816-701-8177
Designation Program Manager	816-701-8137
PDD Operations Director	816-701-8133
Shipping & Fulfillment Manager	816-701-8131
PDD Assistant Operations Manager	816-701-8136
Professional Development Admin Assistant	816-701-8111

IAAO Checklist for Courses/Workshops

Identify Facilities for Program
Identify an Instructor
Determine Instructor Fee
Determine Lodging needs
Fill out Program Application prior to program offering and send to IAAO Education Manager
Send in application for Pre-licensing and/or Continuing Education Approval through state
Determine Registration fee based on site costs, instructor fees, tuition, etc...
Advertise for Program
Determine Classroom set-up
Determine Instructor A.V. requirements
Determine Student Material Needs
Prepare agreements for Instructor
Create confirmation letter for registrants to include: Date, Time (class and registration) and materials needed for class

Three weeks prior to offering

Contact IAAO to report class size and order course material.

One week prior

Contact instructor to ensure that all needs are met. Find out their schedule for arrival and departure to and from.

Review Classroom set-up with facility

Make necessary transportation arrangement for instructors

Two weeks prior to offering

Evening prior

Prepare registration packets:
-Name tag
-Agenda for class
-#2 pencil

Registration
Check Classroom
Deliver any materials to Instructor

If cancellation is necessary:

Cancel without penalty for up to 10 business days before the first day of the program(s). After the 10 business days deadline, liability charges will be incurred. (see cancellation policy for more details)

Contact IAAO
Contact Instructor
Contact Facility
Send letters to registrants

IAAO Coordinator Handbook

Attachments

Attachment Title	Page Number
Attachment #1 Certified Course Application	42
Attachment #2 Contract Course Application.....	44
Attachment #3 One-Day Forum Wholesale Order Form	46
Attachment #4 IAAO Fee Schedule.....	48
Attachment #5 Instructor Contract	51
Attachment #6 Course/Workshop Material Return Form.....	53

Attachment #1

Application for Certified Programs
(Instructor provided by sponsoring organization)

Please submit a separate application for each program. Please print or type.		
Program #	Program Title	
Dates Program to be Offered	City and State of Program Site	
Sponsoring agency name <i>(please do not use acronyms, please spell out)</i>		
Co-Sponsoring agency name <i>(if applicable)</i>		
Contact Name (Education Coordinator)	Title	
Organization/Jurisdiction/Firm	Phone Number	
Business Address	Fax Number	
Business Address	E-mail	
City	State/Prov.	Postal Code
Program facility's on-site address		
Facility's Phone Number	Facility's Fax Number	
Please describe facility		
Would you like this offering to be listed in the Education Calendar on the IAAO website and the <i>Fair & Equitable</i> publication? <input type="checkbox"/> Yes* <input type="checkbox"/> No		
*Please note, we must have at least 3 months notification. Indicate below the agency to be listed as "sponsoring agency" and person to contact (include complete address and telephone number). Person: _____ Phone: _____ Address: _____		
Estimated enrollment in program		

Name(s) of instructor(s) and percent to be taught by each:

(1) Name: _____ %

Is this instructor from the IAAO Approved Instructor Listing?

- Yes, please indicate type: Trainee Regular Senior/Senior Specialty
 No

Is this an In-State Instructor? Yes No

To ensure that this person qualifies as a Local Instructor, please submit the following:

- Copy of their ITW completion certificate or letter, and
 Copy of their completion certificate, examination report, or transcript indicating that they have successfully completed the program you wish them to instruct.

(2) Name: _____ %

Is this instructor from the IAAO Approved Instructor Listing?

- Yes, please indicate type: Trainee Regular Senior/Senior Specialty
 No

Is this an In-State Instructor? Yes No

To ensure that this person qualifies as a Local Instructor, please submit the following:

- Copy of their ITW completion certificate or letter, and
 Copy of their completion certificate, examination report, or transcript indicating that they have successfully completed the program you wish them to instruct.

Class Schedule

Please indicate at least: one 15 minute morning break each day, one 1 hour lunch break each day, one 15 minute afternoon break each day, total instructional hours must total 30 hours for courses and the assigned number of hours for workshops, and allow 3.5 hours for a course exam and 2.5 hours for a workshop exam (in addition to the instructional hours). Only 1.0 hour is allowed for the USPAP exam.

Shipping Address

Please indicate where the program materials are to be shipped. If they are to be sent to the education coordinator, indicate "coordinator" below. Please provide a physical address, no PO Boxes.

Billing Address

Please indicate where IAAO should send the billing invoice for this program. Include name, address and telephone number. Please detail any specific instructions that may be necessary. If billing should be sent to the education coordinator, indicate "coordinator" below.

In making this application, I certify that I have received a copy of the Certified Program Agreement pages and agree to the terms contained therein.

Submitted by _____ Date _____
(signature of education coordinator)

Please print or type

Please print or type

Name: _____ Name: _____

Application for Contract Programs
(Instructor provided by IAAO)

Please submit a separate application for each program. Please print or type.		
Program #	Program #	
Dates Programmed to be Offered	Dates Programmed to be Offered	
Sponsoring agency name <i>(please do not use acronyms, please spell out)</i>		
Co-Sponsoring agency name <i>(if applicable)</i>		
Contact Name (Education Coordinator)	Contact Name (Education Coordinator)	
Organization/Jurisdiction/Firm	Organization/Jurisdiction/Firm	
Business Address	Business Address	
Business Address (con't)	Business Address (con't)	
City	City	City
Program facility's on-site address		
Facility's Phone Number	Facility's Phone Number	
Please describe facility		
<p>Would you like this offering to be listed in the Education Calendar on the IAAO Website and the <i>Fair & Equitable</i> publication?</p> <p><input type="checkbox"/> Yes* <input type="checkbox"/> No</p> <p>*Please note, we must have at least 3 months notification. Indicate below the agency to be listed as "sponsoring agency" and person to contact (include complete address and telephone number).</p> <p>Person: _____ Phone: _____</p> <p>Address: _____</p>		
Estimated enrollment in program		

Instructor

IAAO will select an instructor from the IAAO Approved Instructor Listing. If you would like to IAAO to contact a specific instructor, please write their name below:

Name: _____

Please provide the name, address, and telephone number of a hotel or facility which you believe appropriate for the IAAO Instructor to stay during the program. If the hotel is the same as the program location, indicate "same" below.

Is the facility within walking distance from the classroom site? Yes No

Class Schedule

Please indicate at least: one 15 minute morning break each day, one 1 hour lunch break each day, one 15 minute afternoon break each day, total instructional hours must total 30 hours for courses and the assigned number of hours for workshops, and allow 3.5 hours for a course exam and 2.5 hours for a workshop exam (in addition to the instructional hours). Only 1.0 hour is allowed for the USPAP exam.

Shipping Address

Please indicate where the program materials are to be shipped. If they are to be sent to the education coordinator, indicate "coordinator" below. Please provide a physical address, no PO Boxes.

Billing Address

Please indicate where IAAO should send the billing invoice for this program. Include name, address and telephone number. Please detail any specific instructions that may be necessary. If billing should be sent to the education coordinator, indicate "coordinator" below.

In making this application, I certify that I have received a copy of the Contract Program Agreement pages and agree to the terms contained therein.

Submitted by _____ Date _____
(signature of education coordinator)

ONE DAY FORUM WHOLESAL ORDER FORM**Member Information**

Please print, type, or attach business card:

Member ID # (If applicable) _____ Last 4 Digits of Social Security # _____
 Name _____ Jurisdiction/Firm _____
 Address _____
 City _____ State /Prov. _____ Zip/Postal Code _____ Country _____
 Phone _____ Fax _____ E-mail _____

<i>Ship Material To</i>		<i>Discount Fees</i>
Above Address	Below Address	Discount Fees for Coordinator: Discounts will apply to all educational offerings <u>except</u> in those states that have a previous contract with IAAO that offers a discount. In addition, in order to take advantage of this discount there has to be one payer for the course offering. This discount is as follows: 20 students paid + 1 free = 21 total
Name _____	_____	
Jurisdiction/Firm _____	_____	
Address _____	_____	
City _____ State /Prov. _____	_____	
Zip/Postal Code _____	Country _____	

<i>One Day Forum Information</i>	<i>Shipping Information</i>															
Forum Number/Name: _____ Delivery Date: _____ Class Date: _____ Instructor Name: _____ # of SRMs Requested (\$50 each): _____ Subtotal (#SRM less discount X \$50 each): _____ Shipping Charges (See chart): _____	<table border="1"> <thead> <tr> <th>If your TOTAL is:</th> <th>\$25-\$100</th> <th>\$101-249</th> <th>\$250-\$999</th> <th>\$1,000-\$2,999</th> </tr> </thead> <tbody> <tr> <td>Minimum charge of \$5 for shipping & handling</td> <td>add 20% to order (\$5 minimum)</td> <td>add 15% to order</td> <td>add 10% to order</td> <td>Ground—add 5% handling fee + shipping Expedited—add 20% handling fee + shipping</td> </tr> <tr> <td>Orders >\$3,000</td> <td colspan="4">Ground—add \$150 handling fee + actual shipping costs Expedited—add 10% handling fee + actual shipping costs</td> </tr> </tbody> </table>	If your TOTAL is:	\$25-\$100	\$101-249	\$250-\$999	\$1,000-\$2,999	Minimum charge of \$5 for shipping & handling	add 20% to order (\$5 minimum)	add 15% to order	add 10% to order	Ground—add 5% handling fee + shipping Expedited—add 20% handling fee + shipping	Orders >\$3,000	Ground—add \$150 handling fee + actual shipping costs Expedited—add 10% handling fee + actual shipping costs			
If your TOTAL is:	\$25-\$100	\$101-249	\$250-\$999	\$1,000-\$2,999												
Minimum charge of \$5 for shipping & handling	add 20% to order (\$5 minimum)	add 15% to order	add 10% to order	Ground—add 5% handling fee + shipping Expedited—add 20% handling fee + shipping												
Orders >\$3,000	Ground—add \$150 handling fee + actual shipping costs Expedited—add 10% handling fee + actual shipping costs															

Method of Payment

Check Enclosed. (Make checks payable to IAAO, US funds only)

Charge my: Visa MasterCard AmEx

Card Number _____ Expires _____

Name _____ CSC _____
Print card holders name 3 or 4 (AMEX)
digits

Signature _____

Returned check charge is \$25. No refund or transfers allowed.

ONE DAY FORUM WHOLESALE ORDER FORM

Forum# Forum Title

909	Valuation of Commercial Properties in a Declining Market
910	Valuation of Convenience Stores
911	Valuation of Contaminated Properties
917	How to Critique an Appraisal
931	Reading & Understanding Leases
932	Restructuring Income/Expense Statements
960	Marshall & Swift Residential – Square Foot Method
962	Marshall & Swift Commercial – Square Foot Method

Those receiving a copy of a SRM and/or PAAA, PAV or MARP from the association must agree they will not, without the express written permission of the association's Executive Director:

1. Use the SRM, PAV or MARP, or any part thereof, except for the purpose stated above.
2. Reproduce or permit reproduction of the SRM, PAV or MARP, or any part thereof, in any manner, or
3. Sell, loan, give, or otherwise transfer the SRM, PAV or MARP, or any part thereof, to anyone.

In return of a copy of the IAAO Student Reference Manual, PAV or MARP, I hereby agree to abide by the above requirements.

Signature

Date

**IAAO PROFESSIONAL DEVELOPMENT DEPARTMENT
COURSE, WORKSHOP AND ONE DAY FORUM FEE SCHEDULE
January 1, 2017 – DECEMBER 31, 2017**

Subject to change without notice.

COURSE FEES – Per Program Rates

Fiscal Year 2017 Courses	Certified	Contract	IAAO Conducted (given by IAAO)	
			Member	Nonmember
101, 102, 112*, 201, 300, 331, 332, 333, 400, 402, 500, 600, 601	\$ 285	\$420	TBD	TBD
311, 312	\$250	\$405	TBD	TBD

Contract courses: IAAO is responsible for the instructor selections, and honorarium. The sponsoring agency is responsible for all promotional material, registration, and facilities. Contract programs assume a minimum enrollment of 25 students or the equivalent fees. Maximum enrollment is 50 students.

Certified courses: The sponsoring agency is responsible for the instructor selections, expenses and honorarium, in addition to all promotional material, registration, and facilities. Only instructors approved by IAAO may teach IAAO certified programs. Certified programs assume no minimum enrollment. Maximum enrollment is 50 students.

Textbooks: The textbook *Property Assessment Valuation* (3rd edition, ©2010) is the recommended text for courses 101, 102, 112 & 201. The cost to students, through the education coordinator, is \$50. The textbook *Assessment Administration* (1st edition, ©2003) is the recommended text for Course 400. The cost to students, through the education coordinator, is \$40. The textbook *Fundamentals of Mass Appraisal* (1st edition, ©2011) is the recommended text for courses 300. The cost to students, through the education coordinator, is \$50. The textbook *Fundamentals of Tax Policy* (1st edition, ©2008) is the recommended text for Course 402. The cost to students, through the education coordinator, is \$55. These prices are only available to the coordinator who is offering the course, at the time they are ordering their course materials.

**IAAO PROFESSIONAL DEVELOPMENT DEPARTMENT
 COURSE, WORKSHOP AND ONE DAY FORUM FEE SCHEDULE
 January 1, 2017 – December 31, 2017
 Subject to change without notice.**

WORKSHOP FEES

Fiscal Year 2017	Certified	Contract	IAAO Conducted (given by IAAO)	
			Member	Nonmember
Workshops				
1 day: 171 (IAAO Standards)	\$116	\$160		
1 ½ and 2 day: 100, 150, 155, 157, 158, 162, 163, 252, 257, 260, 354, 650, 651, 854	\$215	\$280	TBD	TBD
2 day: 151 – National USPAP	\$175	\$280	TBD	TBD
1 day: 181 – USPAP 7 hr - Mass Appraisal 191 – USPAP 7 hr Update	\$116	\$170	TBE	TBD
2 ½ and 3 day: 403, 452, 551, 552, 553, 850, 851, 852	\$236	\$310	TBD	TBD

Contract workshops: IAAO is responsible for the instructor selections, and honorarium. The sponsoring agency is responsible for all promotional material, registration, and facilities. Contract programs assume a minimum enrollment of 25 students or the equivalent fees. Maximum enrollment is 50 students.

Certified workshops: The sponsoring agency is responsible for the instructor selections, expenses and honorarium, in addition to all promotional material, registration, and facilities. Only instructors approved by IAAO may teach IAAO certified programs. Certified programs assume no minimum enrollment. Maximum enrollment is 50 students.

Textbooks: The textbook *Fundamentals of Industrial Valuation* (1st edition, ©2007) is a recommended text for Workshop 257. The cost to students, through the education coordinator, is \$45. These prices are only good to the coordinator who is offering the course.

USPAP Manual: Effective 1/1/16, the 2016-2017 edition of the Uniform Standards of Professional Appraisal Practice (USPAP) will be used. The above listed “per student” fee for Workshop 151, 181 and 191 includes the student manual as well as the USPAP book.

**IAAO PROFESSIONAL DEVELOPMENT DEPARTMENT
 COURSE, WORKSHOP AND ONE DAY FORUM FEE SCHEDULE
 January 1, 2017 – DECEMBER 31, 2017
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FORUM FEES

Fiscal Year 2017 Forums	Wholesale	IAAO Conducted (given by IAAO)		Certified
		Member	Nonmember	
909, 910, 911, 917, 931, 932, 960, 962	\$ 50	TBD	TBD	\$129

Wholesale Forums: IAAO will sell the sponsoring agency forum materials **ONLY**. The sponsoring agency is responsible for all promotional material, registration, facilities, instructor selection, expenses and honorarium. All wholesale forums are pre-paid orders only.

Certified Forums: The sponsoring agency is responsible for all promotional materials, registration, instructor selections, expenses, honorarium and facilities. Only instructors approved by IAAO may teach IAAO certified forums. Certified forums assume a minimum enrollment of 25 attendees or the equivalent fees.

IAAO Conducted Forums: IAAO is responsible for everything. IAAO may schedule forums as it deems appropriate.

CONTRACT FOR TEACHING ASSIGNMENT

This independent contractor agreement ("Agreement") is entered into this 3rd day of December 2002, by and between the INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS, 314 W.10th Street, Kansas City, MO 64105 ("IAAO") and «Instructor Fname I» «Instructor Lname»«InstructorDesignation» ("Instructor") for the teaching of «Course», «Course Title», from «Beginning Date» to «Ending Date» in «Location City», «Location State».

As IAAO requires an instructor for its course or workshop, and Instructor is an independent contractor having the interest and expertise to perform as such, the parties hereto have entered into this Agreement, under which Instructor will be retained as an independent contractor to provide such instruction, and IAAO will pay Instructor an honorarium not to exceed \$ 3,500.

Except as specifically provided herein, IAAO shall have no right to control or direct details, manner or means by which Instructor shall accomplish teaching of the course or workshop as provided in this Agreement, but shall only have a right to provide direction with respect to the required results. In teaching the course or workshop, however, Instructor, as a member of IAAO, shall remain subject to IAAO's Code of Ethics and Standards of Professional Conduct and its bylaws. Furthermore, Instructor agrees that the course or workshop will be taught in accordance with all applicable federal, state, provincial or local laws, including, but not limited to, attendee certification requirements.

The parties agree that Instructor shall have a right to employ, at his or her own expense, other individuals to help Instructor in performing non-instructional services required under this Agreement, provided that Instructor shall have the responsibility to supervise and guarantee the quality of all services provided.

Instructor shall be responsible for payment of all expenses related to performance of services under this Agreement, except that IAAO shall provide course materials that shall be used in teaching its course or workshop, including student and instructor manuals, demonstration materials, etc., as may be consistent with policies adopted by IAAO. IAAO will reimburse no expenses incurred by Instructor in performing services under this Agreement, including, but not limited to, travel expenses, lodging, meals, and the cost of additional teaching materials supplied by Instructor, whether or not such expenses exceed the honorarium paid to Instructor under this Agreement.

Instructor, at his or her own expense, may provide additional teaching materials for use in performing services under this Agreement. In such cases, Instructor will assume responsibility for obtaining copyrights or permission to use copyrighted materials as additional teaching materials. Furthermore, all additional teaching materials created by Instructor for use in performing services under this Agreement shall be considered the property of Instructor and may be used by Instructor for other purposes, including the teaching of other courses and workshops for other organizations.

Instructor shall have a right to perform similar instructional services for other clients, whether or not such other clients compete with IAAO. Instructor may not use parts or all of IAAO copyrighted materials nor imply IAAO approval or endorsement of instruction that does not come from IAAO certified or contracted schools. Notwithstanding Instructor's right to perform services for other clients, Instructor shall maintain as confidential, and shall not disclose to any other person or entity, any confidential or proprietary information of IAAO that is disclosed to

Instructor in connection with his or her performance of services under this Agreement. Additionally, when requested by IAAO, after Instructor's teaching responsibilities under this Agreement have been concluded, Instructor shall return to IAAO specified materials provided to instructor by IAAO, and all copies of such materials which may then be in Instructor's possession or control.

IAAO's Education Department will provide Instructor with further information concerning his or her duties as an instructor of an IAAO course or workshop, and Instructor agrees to devote his or her best efforts to achieving the results IAAO desires for the particular course or workshop to be taught by Instructor.

It is understood by the parties that Instructor is an independent contractor and not an employee of IAAO. IAAO will have no obligation for worker's compensation, federal and state payroll taxes, unemployment taxes, social security assessments, or similar taxes or liabilities relating to the performance of services by Instructor under this Agreement. Nor shall Instructor have any authority to bind IAAO in any transaction relating to this Agreement or otherwise.

This Agreement is a legal contract. In the event of a material breach by either party, the breaching party shall be responsible to the other party for payment or reimbursement of all losses and expenses directly or indirectly incurred by the non-breaching party as a result of the breach, including, but not limited to, attorney's fees and court costs incurred by the non-breaching party in obtaining enforcement of this Agreement.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed as of the day and date first written above.

By:

Instructor

Date

IAAO

By:

Executive Director

Date

IAAO Professional Development Department

COURSE/WORKSHOP BILLING CONFIRMATION AND MATERIAL RETURN FORM

TO: Jack Smith

Department of Revenue/Property Tax

Phone: (123) 555-1212

Fax: (123) 555-1313

Email: jacksmith@anywhere.us.com

Re: 11111298765, Course 300, Fund of Mass Appraisal, October 26, 2012, Anywhere, US, October 26, 2012

Billing Confirmation: To ensure accurate billing, this form must be completed, signed, and faxed to IAAO (816-701-8169) within 3 business days of course end date.

_____ Total number of Student Reference Manuals sent by IAAO

_____ Total number of textbooks sent by IAAO

Material Return Form: All excess materials must be received by IAAO within **5 business days** of course **end date**. **NO CREDITS** will be issued for returned materials received after this date. Ship by traceable method of choice.

To receive credit for unused materials:

- All unused materials must be returned in the condition received.
- Return materials in a sturdy box; do not re-use the original shipping box if its condition is questionable.
- Do not pack materials on top of binders.
- Textbooks cannot be returned unless in original shrink-wrap or in the condition received.
- Effective with July 2014 courses, all returns over the allotted number of 5 items (SRM's or textbooks) will be subject to a 10% Restocking /Administrative Fee.
- Enclose a copy of this form with the shipment in addition to faxing. It must be filled out and signed for processing.

Please ship to: Shipping Department, IAAO, 314 W. 10th Street, Kansas City, MO 64105
Inventory of Returned Material

→REMEMBER: Enclose a copy of this form with the shipment.←

QUANTITY	ITEM	QUANTITY	ITEM
	SRM (Student Reference Manual)		PAV's (Old/New) Book
	SRM damaged		PAAA Book
	USPAP		FMA/MARP Book
	GIS Books		Assessment Admin Book
	Mapping Tool Kit		Tax Policy Book
	Other:		Industrial Valuation Book

Completed by: _____

Date: _____