

IAAO Annual Report 2022



A wise gentleman used to tell my fellow Oklahoma assessors to “leave the woodpile a little higher than you found it” and after a year as serving as president of the International Association of Assessing Officers, I hope I have done so.

I want you to know how honored I was to be able to serve as your IAAO president. To serve as president, in my opinion, is the highest honor anyone in our profession can receive.

As president, my goals included advocating and networking on behalf of our profession, and I believe this report shows we have done that. Each day I wanted to make sure we were building up our profession.

In 2022, using the association’s strategic plan, which the IAAO Board of Directors reviewed last year, we looked at ways to improve and focus the resources of the association. From education to membership, from meetings to advocacy, and business innovation, there is always a lot we can work on and the plan helped keep us focused.

A theme of “stay in your lane” also kept us focused on how we will be of value around the globe, which is clearly stated in our mission statement. While the majority of our members are in the United States, it is imperative for the IAAO to understand the different valuation methodologies that exist around the globe.

Over the past year, IAAO met with a number of industry organizations in the United States and around the world. Those meetings assisted us in understanding issues facing other groups and working together on areas of common interest.

Whether you work for a township, city, county, state or national organization, or business partner, we all share similar issues, problems, and concerns and working on those areas was a focus of the Board.

I hope we made improvements in those areas during my term as president as I was so pleased to have this opportunity.

Wade Patterson
2022 IAAO President



2022 President Wade Patterson, 2021 President Greg McHenry, AAS, and 2020 President Amy Rasmussen, RES, AAS. McHenry passed away in February 2022 and former President Rasmussen was appointed to fill his unexpired term on the Board of Directors as Past President.



President Patterson spoke at the TEGOVA meeting in October.



IAAO Executive Committee met with members of The Appraisal Foundation in January 2022 as part of meetings with industry groups.



2022 Highlights

STRATEGIC PLAN



IAAO MISSION STATEMENT

International Association of Assessing Officers (IAAO) is a global community of diverse mass appraisal professionals advancing fair and equitable property appraisal, assessment administration, and property tax policy through professional development, research, standards, and technical assistance.

GOAL 1: Professional Development

IAAO will empower and guide the global mass appraisal community on their professional development path with personalized education and credentialing options in mass appraisal, assessment administration, and property tax policy.



GOAL 2: Community Engagement

IAAO will be a diverse and inclusive global community of engaged professionals in the areas of mass appraisal, assessment administration, and property tax policy.



GOAL 3: Communications and Advocacy

IAAO will maintain the best source of information, public relations, and research and standards used to advocate on behalf of the overall profession and diversity of individuals engaged in the fields of mass appraisal, assessment administration, and property tax policy.



GOAL 4: Business Innovation

IAAO will maximize its potential in existing markets utilizing current offerings and also identify the unmet needs of the core mass appraisal market segment, which includes individuals, jurisdictions, and other defined stakeholders.



IAAO 2022 BOARD MEMBERS & HQ TEAM

Executive Committee

President - L. Wade Patterson
President-Elect - Patrick Alesandrini, CAE, RES
Vice President - Rebecca Malmquist, CAE
Past President - Amy Rasmussen, RES, AAS, FIAAO

Directors (Term expired December 31, 2022)
 William Healey, RES
 G. Cecil Jackson, Jr.
 Dinah Kilgore

Directors (Term expires December 31, 2023)
 Brian Gay
 Marcy Martin, AAS
 Terry Taylor, CAE, RES, AAS

Directors (Term expires December 31, 2024)
 Kara Endicott, CAE, RES
 Greg Hutchinson
 Bobby T. Lee, Esq., AAS
 Ryan Cavanah, CAE

Executive Director - Debra McGuire, MBA, IOM, CAE

IAAO Team*

Mike Ardis, MSJ, APR
Sr. Director, Communications & Technology

Tammy Brown
Director, Marketing

Shawn Chevreux
Sr. Director, Membership and Community Engagement

Larry Clark, CAE, FIAAO
Director, Strategic Initiatives

Erin Eades, MBA
Manager, Operations

Toni Eichholz, IOM
Coordinator, Community Engagement

Elizabeth Ferguson, Ph.D.
Research Librarian

Daniel Fuchs
Manager, Community Engagement

Jordyn Garey
Learning Content Developer

Shannon Hiss, RES, RMA
Assessment Advisor

Shawn Lee House
Administrative Coordinator

Anita Lara, CMP
Director, Meetings and Events

Ashley Lathrop, MBA
Senior Director, Business Innovation

Rachel Mense
Coordinator, Meetings

Heather Moser, M.S.Ed.
Sr. Director, Professional Development

Mindy Murphy-Watson
Executive Administrator

Veronica Nalley
Sr. Instructional Designer

Sarah Noakes
Manager, Digital Technology

Jarron Paronto
Sr. Manager, Credentialing

Leann Ritter, MS, CAE
Director, Strategic Partnerships

Keith Robison
Manager, Publications

Kevin Thomas, M.S.Ed.
Sr. Manager, Learning Design

Allyson Weber, MLA
Accountant Specialist

Shaun York
Director, Technology

Kimberly Wollman
Administrative Assistant

*Current titles



Professional Development

ACCOMPLISHMENTS

- Created process and schedule to update all IAAO 30-hour courses.
- Launched the Instructor Resource Center (IRC). This repository is located on the IAAO-U portal at learn.iaao.org and contains resources specifically selected for IAAO instructors and anyone who teaches.
- Completed design, development, implementation, and evaluation phases of the instructional design process for Course 402 rewrite to modernize the course and conducted a first-of-its-kind pilot class at IAAO headquarters. (Final release expected June 2023)
- Created and delivered a customized mass appraisal training program for students from the Valuation Office Agency in the United Kingdom.
- Total of 146 new designation candidates, exceeding goal by more than 8%. Candidates by designation were: AAS 59; CAE 32; CMS 13; MAS 4; PPS 13; and RES 25.
- Began marketing and staged rollout of IAAO's new mentorship program, Value in Exchange, utilizing the online platform Mentorship Rocket, allowing 100 members the opportunity to participate.
- Designation Fast Track offerings are in place for students to complete education requirements for up to three designations in 2023: RES, AAS, and MAS.
- Completed the GROW Into Coaching as a self-study online program and it is offered within the Leadership Curriculum of IAAO-U. To date, 20 individuals have completed the new program.
- Held two instructor evaluation workshops: seven participants attended the virtual experience in March with four passing. 14 individuals participated in the Kansas City-based in-person event in June and seven passed, earning the certified IAAO junior instructor title.
- Worked with the IAAO Conference Content Task Force to develop the Call for Presentations; URISA for presentations for the GIS/ValTech Conference and IPTI for the Mass Appraisal Valuation Symposium.
- Using the new Instructor Certification Program (ICP) 118 instructors completed their recertification.

WHAT'S NEXT IN PROFESSIONAL DEVELOPMENT FOR IAAO?

In mid-2022, the Professional Development Department (PDD) launched IAAO-U as a framework in which educational offerings will reside and will continue to expand in 2023. IAAO-U offers students increased flexibility, focused on multiple educational options and modalities to fit students' needs.

IAAO is continuing to work to expand its instructor base and, in conjunction with the inaugural conference of the Alabama Chapter of IAAO, in January 2023 set up an Instructor Evaluation Workshop in Point Clear, the first IEW in Alabama.

IAAO also is working to expand the number of members with designations. Professional Development Committee members, current designees, and program staff offer bi-monthly webinars as they answer questions and share experiences in earning a designation.

2022 STUDENT REGISTRATIONS

In-person	3,301
Live online	2,439
Self-study	1,662
Webinars	1,304

TOTAL 8,706

A RECORD TOTAL!

IAAO 2022 President Wade Patterson (right) thanks Alan Dornfest, AAS, FIAAO, of the Idaho State Tax Commission and students from jurisdictions in Kansas and Missouri for taking part in the pilot offering of IAAO Course 402 - Tax Policy at the IAAO headquarters.





Membership & Administration

8,159

Regular members

461

Associate members

43

Affiliate members

2,200

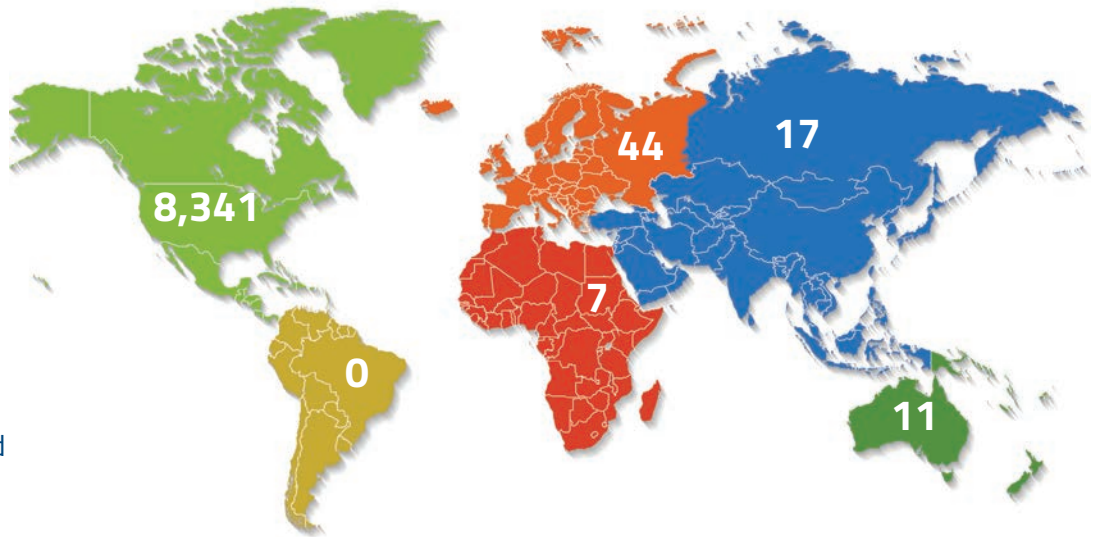
Jurisdictions represented

1,135

New members in 2022

325

Committee and Task Force volunteers



8,069

Members in the United States

271

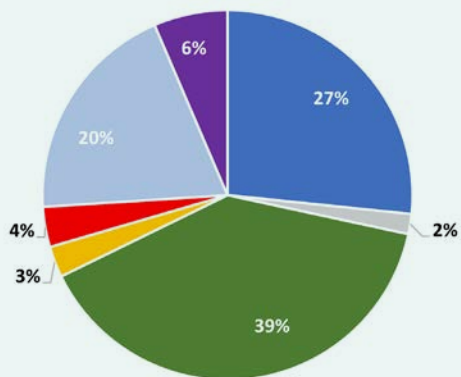
Members in Canada

1

Member in Mexico

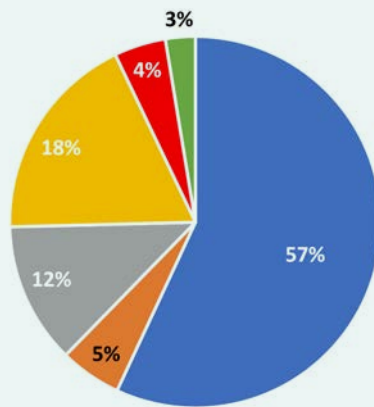
2022 FINANCIALS*

OPERATIONAL REVENUE \$6,187,978



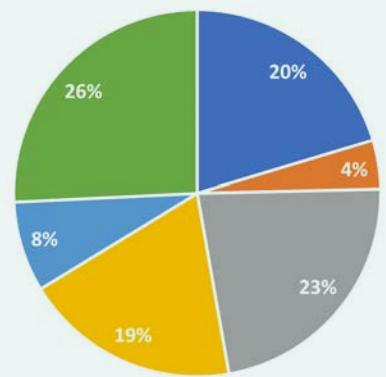
- Membership Dues
- Education Program Fees
- Designation Income
- Sponsorships
- Advertising
- Publications Sales & Other
- Conference Income

OPERATIONAL EXPENSES \$5,254,063



- Administrative
- Occupancy & Operational
- Fees for Services
- Board
- Events
- Other

EXPENSES by Function



- Administration
- Professional Development
- Publications & Marketing
- Research
- Membership
- Conference

* Unaudited. Audit is being completed in April 2023 for FY 2022.



Meetings & Events

MEMBERS FLOCK TO MEETINGS

IAAO saw one of its biggest crowds in years with the 88th Annual Conference in Boston in 2022. More than 1,500 people participated. Two plenary sessions, a keynote presentation, and educational sessions were offered. IAAO future conferences are in Salt Lake City - 2023; Denver - 2024; Orlando - 2025; Calgary - 2026; and Charlotte - 2027.

Legal Seminar

Approximately 130 attended IAAO's 2022 Legal Seminar in Austin, Texas, in December. Themed "We're in This Together," the seminar addressed contemporary legal topics in the assessment and appeals process.

Leadership Days

IAAO hosted two Leadership Days meetings in Kansas City, MO.

GIS/Valuation Technologies

IAAO and URISA offered the GIS/Valuation Technologies Conference in New Orleans in March 2022, with more than 300 attending.

IAAO, IPTI offer virtual MAVS

IAAO joined with the International Property Tax Institute to offer the Mass Appraisal Valuation Symposium online in June 2022.

Women's Initiative Network

IAAO hosted the online Women's Initiative Network workshop on *Getting Along: Navigating Conflict in the Workplace*.



Adrienne Haslet, a former ballroom dancer and survivor of the 2013 Boston Marathon bombing, was the keynote speaker at the 2022 IAAO Annual Conference.



Amy Gallo, an expert in conflict, communication, and workplace dynamics, was the featured speaker at the WIN Luncheon at conference and at the November workshop.



Individuals and jurisdictions were recognized during the Awards Ceremony at the conference.



More than 1,500 people attended the IAAO Annual Conference in Boston, one of the largest crowds in recent years.

CONFERENCE NUMBERS

1,178

in-person attendees

43

virtual attendees

274

exhibitor attendees

1,542

total participants

323

first time attendees

47

exhibiting firms

25

sponsors

12.5

in-person credit hours

15

Networking Hubs (roundtables)



PROFESSIONAL CONSULTING SERVICES WORKING WITH JURISDICTIONS TO IMPROVE ASSESSMENTS

Promoting innovation and excellence in property appraisal, tax policy, and administration, IAAO works with jurisdictions to find solutions to complex property tax matters. Through its Professional Consulting Services, IAAO provides objective, insightful advice to jurisdictions around the world.

During 2022, IAAO worked with multiple jurisdictions to improve assessments. As part of those efforts, PCS focused on providing ratio studies, a gap analysis, and preparation for and monitoring of reappraisal projects.

IAAO Professional Consulting Services (PCS) can help jurisdiction establish performance benchmarks through an all-new, gap analysis service. In addition to the Gap Analysis and reassessment monitoring, PCS provides a wealth of services aimed at promoting best practices for the assessment administration market.

Jurisdictions IAAO partnered with in 2022

- Philadelphia, Pennsylvania
- Virgin Islands
- Jackson County, Missouri
- Smithtown, New York

IAAO MEETS WITH WASHINGTON, D.C. INDUSTRY GROUPS

Members of the IAAO Executive Committee and IAAO staff met in January 2022 with representatives of the National Association of Counties, the National League of Cities, the National Association of Towns and Townships (NATaT), The Appraisal Foundation, and the World Bank.

The meetings provided an opportunity for IAAO to visit with four of the organizations it has previously worked with and a chance to establish new ties with the NATaT. IAAO reviewed common areas of interest and discussed issues of importance to each of the other organizations.

In addition to the meetings, representatives of IAAO and the National Association of Counties (NACo) met with senior representatives of the U.S. Department of Housing and Urban Development in a video call in August on fair housing valuation and HUD’s Interagency Task Force on Property Appraisal and Valuation Equity (PAVE).

PAVE Executive Director Melody Taylor and Deputy Assistant Secretary Alan Williams from HUD were on the call with IAAO representatives and NACo Legislative Director Michael Matthews.



In addition, President Wade Patterson was a speaker on a September online forum sponsored by The Appraisal Foundation on education requirements on fair housing laws and valuation bias.



2022 Highlights

2022 SPONSORS, EXHIBITORS, AND ADVERTISERS



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| American Society of Appraisers | Ecopia Tech Corporation | Price Waterhouse Coopers |
| Apex Appraisal Solutions | E-Ring, Inc. | RSI |
| Applications Software Technology, LLC | Esri | Schneider Geospatial Spatialest |
| Appraisal Institute | Farragut Systems | Tax Management Associates, Inc. |
| Assessment Analyst by Esri Canada | Government Software Assurance Corp. | TEAM Consulting, LLC |
| Aumentum Technologies | Harris Govern | The Master's Touch, LLC |
| Axiomatic | Ingenuity, Inc. | The Sanborn Map Co. |
| C3.ai, Inc. | Just Appraised Inc. | Thomas Y. Pickett & Co., Inc. |
| Cartographic Associates, Inc. | Kofile, Inc. | Tighe & Bond, Inc. |
| CoreLogic | Korpacz Realty Advisors, Inc | TransUnion |
| Coverlease, Inc. | LexisNexis® Risk Solutions | Trepp |
| CRED - Cell Tower Valuation | Linebarger Goggan Blair & Sampson, LLP | TrueRoll |
| CycloMedia Technology, Inc | Moore Precision Cost | Tyler Technologies, Inc. |
| Data Cloud Solutions, a Woolpert Company | Muskegon County Equalization | Valcre |
| Deckard Technologies, Inc. | Nearmap USA, Inc. | ValueFinder LLC |
| DEVNET, Inc. | Oklahoma Chapter of IAAO | Vexcel Imaging US, Inc. |
| EagleView | Oklahoma State University | Vision Government Solutions, Inc. |
| | Patriot Properties, Inc. | Vita Lansworth |

2022 INTERNET & LIBRARY USAGE

IAAO website

119,155
website users

1,154,695
page views

IAAO Connect

8,617

members in an IAAO Connect community

Career Center

53,949
job views

139
job postings

Library usage

272 library reference requests

742 articles emailed to requesters

3,403 catalog searches

1,066 downloads from library catalog

1,552 downloads from Research Exchange

3,360 total articles delivered

89 new catalog items

Research Exchange contacts from

29 countries

More than \$100,000 in savings to members