

PROCEDURAL RULES OF THE INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS

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1 SECTION 1. STATEMENT OF PURPOSE

1.1 THE THREE PILLARS

All publications and programs of the Association should emphasize the three main interests of the Association, as incorporated in the Association's mission of promoting innovation and excellence in property appraisal, property tax administration, and property tax policy.

1.2 COMMITMENTS

The Association is committed to the following specific goals:

- (a) to support and promote professional development
- (b) to prepare and deliver educational services
- (c) to provide technical assistance and consulting services
- (d) to strengthen membership and encourage growth
- (e) to provide information and counseling
- (f) to provide and encourage research
- (g) to promote public understanding.

2 SECTION 2. OFFICES

The Executive Board may approve other IAAO offices (in addition to the principal office), if it is financially feasible.

3 SECTION 3. MEMBERSHIP

3.1 REGULAR MEMBERS

(Reserved for future use)

3.2 ASSOCIATE MEMBERS

(Reserved for future use)

3.3 HONORARY MEMBERS

(Reserved for future use)

3.4 AFFILIATE MEMBERSHIP

(Reserved for future use)

3.5 MEMBERSHIP APPLICATIONS

(Reserved for future use)

3.6 VIOLATION OF CODE OF ETHICS

3.6.1 Processing of Complaints of Alleged Violations of the Code of Ethics and/or Standards of Professional Conduct

3.6.1.1 *Committee Structure and Decisions*

- (a) There shall be a standing committee within the organizational structure of IAAO, known as the Ethics Committee.
- (b) The Ethics Committee shall consist of a Chair, vice-chair, and three other committee members, all of whom shall be regular members of IAAO in good standing, and one associate member, none of whom shall be members of the Executive Board or officers of IAAO. The Chair shall be appointed by the President to serve a one (1) year term and shall at all times be eligible for reappointment, provided only that he or she is not a member of the Executive Board or an officer of IAAO and is a regular member of IAAO in good standing. The members of the committee shall be appointed so that the terms of two members shall expire each year, with the vice-chair, a regular member, being designated by the President each year for a one- (1-) year term.
- (c) All Ethics Committee decisions with regard to alleged violations of the IAAO Code of Ethics and/or Standards of Professional Conduct shall be reached by unanimous vote of those members present and voting. Votes of the Ethics Committee members may be taken by mail, electronic means, or telephone, provided that all members are canvassed simultaneously and a report of the vote is transmitted to all Ethics Committee members. Dissents by an Ethics Committee member from majority actions or holding may be expressed in writing and submitted to the Chair.

October 18, 2014 Approved changing (c) to "reached by unanimous vote"

November 14, 2015 made clean-up edits to (b); added with regard to alleged violations of the IAAO Code of Ethics and/or Standards of Professional Conduct shall be reached by unanimous vote of those members present and voting; electronic means.

- (d) Upon commencement of new committee members' terms, the new committee will assume responsibility for all current and pending ethics cases.

3.6.1.2 Responsibility and Authority

- (a) It shall be the duty of the Ethics Committee to consider all matters under the jurisdiction.
- (b) The jurisdiction of the Ethics Committee shall be:
 1. Any complaint concerning questions of the IAAO Code Ethics and/or Standards of Professional Conduct. All complaints forwarded to the Ethics Committee shall state the specific provisions allegedly violated.
 2. Any other matters as may be assigned from time to time by the IAAO Executive Board.
- (c) The Ethics Committee shall have the authority to refuse to entertain any matter that it determines to be repetitive of a previously considered matter unless substantial new evidence to warrant the Ethics Committee's reevaluation of the matter is submitted with the new complaint..

April 5, 2013 Approved changing 'concurred in by the Executive Board' to 'the Executive Board concurs.'

- (d) The Ethics Committee shall have the authority and responsibility, as provided in these procedural rules, to receive, investigate, seek information if necessary, dismiss or issue letters of charge, conduct hearings, and recommend appropriate disciplinary action.
- (e) A complaint may be initiated by the Ethics Committee on its own motion, from one or more individual members of the Ethics Committee and that complaint shall be processed in the same manner as other complaints received by the Ethics Committee.
- (f) The Ethics Committee shall have responsibility for rendering advisory opinions to the IAAO Executive Board relating to the interpretation and application of the IAAO Code of Ethics and/or Standards of Professional Conduct. Advisory opinions may be issued in response to requests from IAAO members or other related organizations such as IAAO Committees. Any advisory opinion shall not be binding upon the Association unless the Executive Board concurs.

3.6.1.3 Meetings

- (a) The Ethics Committee shall meet on the call of the Chair, or on a petition of a majority of the committee members, provided the time and place of the in person meetings have been approved by the President. A majority of the members shall constitute a quorum. Conference calls or communication by other electronic means will be at the discretion of the Chair in coordination with the Executive Director.

- (b) Whenever the Chair, for any reason, is unable to act, the vice-chair shall have all of the duties and authority of the chair and shall act as Chair.
- (c) Meetings of the Ethics Committee shall be open to the membership and staff of IAAO unless otherwise required by these rules and procedures.

3.6.1.4 Confidentiality

- (a) All matters concerning alleged ethical violations shall be accorded confidentiality by the Ethics Committee and all other persons who may be privy to any proceedings concerning alleged ethical violations. The Ethics Committee Chair has the authority to disclose to the Executive Board in executive session alleged violations that may require the expenditure of funds for legal representation and allegations involving the IAAO Executive Director, staff, committee or the Executive Board.
- (b) All discussions of any alleged or potential ethical violation at any meeting of the Ethics Committee shall be in executive session. The Chair of the meeting shall take all appropriate measures to ensure the confidentiality of the proceedings. Such measures shall include, but not be limited to, the exclusion from the meeting room of all parties who are deemed by the Ethics Committee to be unnecessary to the proper conduct of the proceedings. Except as to distributions provided for in sections 3.6.1.5(b), 3.6.1.6, 3.6.1.7(x), 3.6.1.8(b)(f)(g), 3.6.1.9(b), and 3.6.2. of these Procedural Rules, prior to any distribution of documents, including minutes or agendas, to persons other than Ethics Committee members and staff, any language identifying any member with any alleged ethical violation shall be censored by redacting the identifying language.

April 5, 2013 Changed 'making the offending language illegible' to 'redacting the identifying language.'

- (c) All final decisions on disciplinary actions taken by IAAO against its members for ethics reasons shall be published in an IAAO publication. All other records leading to the disciplinary action shall be sealed from the public and placed in IAAO files. Release of sealed records will be made only as required by a court of law. Refer to section 3.6.4.
- (d) Dismissal of complaints shall be published in an IAAO publication only upon the written request of the respondent.

3.6.1.5 The Complaints: Form, Content, and Receipt

- (a) Complaints of alleged violations of the IAAO Code of Ethics and/or Standards of Professional Conduct may be received from any source, including nonmembers of the Association. The complaint shall be filed within one year of either the date of the alleged violation or the finding of a duly authorized authority whichever is later. The complaint shall be in writing on an approved "IAAO Ethics Complaint Form" and signed by the person(s) complaining, hereinafter referred to as "complainant." A complaint issued by the Ethics Committee shall be signed by the Chair of said committee. The signed form shall contain the following:
 - (1) the full name, address, and telephone number of the person(s) or organization making the complaint;
 - (2) the full name, address, and telephone number, if known, of all members whose alleged conduct is the subject of the complaint;

- (3) a plain and concise statement of the facts and violations alleged;
- (4) any other information deemed relevant by the complainant;
- (5) the date of alleged violation.

The complainant shall ensure that copies of all documents, assessment records, and appraisal reports relevant to the complaint, and available to the complainant, are attached to the complaint when it is filed.

- (b) All complaints shall be transmitted to the Executive Director. The Executive Director or designated member of staff shall record the receipt of the complaint, prepare a case file, and immediately mail uncensored copies of the complaint to the chair and members of the Ethics Committee, and to the person(s), hereinafter referred to as “respondent,” whose alleged conduct is the subject of the complaint with a letter stating that the complaint has been referred to the Ethics Committee. The letter shall notify the respondent that the respondent shall file a written reply with the Executive Director within thirty (30) business days after receipt of the complaint and that failure to file a written reply may be considered by the Ethics Committee to be an admission of the charges in the complaint. The letter and a copy of the complaint shall be sent by any form of courier service that confirms delivery by a return receipt, hereinafter referred to as “courier service,” along with a copy of these Procedural Rules. The Executive Director or designated member of the staff shall immediately transmit any reply to the chair and members of the Ethics Committee.
- (c) After receiving a copy of the complete and signed complaint from staff and after the mailing to the respondent has been made, the Ethics Committee, assisted by staff, shall examine the complaint and make whatever inquiries the Ethics Committee deems necessary to gather the information necessary to dispose of the complaint. Whenever, after investigation of any complaint, the Ethics Committee finds that it lacks jurisdiction or the facts do not support the alleged charge(s), the Ethics Committee shall dismiss the complaint and the Chair shall notify the complainant and the respondent of the Ethics Committee’s actions. If, upon investigation, it is determined by the Ethics Committee that a complaint has merit and meets the Ethics Committee’s jurisdictional requirements, the Chair shall instruct the Executive Director or designated staff to issue and send by courier service, that confirms delivery by a return receipt, to the respondent. If, upon investigation, it is determined that there are ongoing proceedings before any federal, state, provincial, or local tribunal that may impact upon the Ethics Committee’s processing of the complaint, the Ethics Committee may stay its own proceedings until resolution of such matters.
- (d) The Ethics Committee Chair has the authority to instruct the Executive Director to return the complain if it is not in proper form, with or without suggestions for change and with the notification that if the complaint is not amended to correct deficiencies within thirty (30) business days, the Ethics Committee may dismiss all charges.

- (e) If any respondent resigns their IAAO membership during any stage of the ethics complaint investigation process they will not be allowed to reapply for IAAO membership for a period of three (3) years.

3.6.1.6 *Letter of Charge*

The letter of charge shall include a clear and precise description of the acts that are claimed to constitute the alleged misconduct, and shall set forth the provisions of the IAAO Code of Ethics and/or Standards of Professional Conduct that may have been violated. Any reply to a letter of charge should be sent to the Executive Director by courier service that confirms delivery by a return receipt. If necessary, a hearing on the charges contained in the letter will be arranged. The letter of charge shall contain notice that failure of the respondent to appear at the hearing may result in disciplinary action.

3.6.1.7 *Hearings*

- (a) In most cases, the hearing shall be held in the city where the Association headquarters is located, but hearings may be held elsewhere at the Ethics Committee's discretion and upon approval of the President. A simple majority of the Ethics Committee may conduct scheduled hearings. When any member of the Ethics Committee believes they have a conflict of interest and/or feel unqualified to participate in a particular hearing, that member shall withdraw therefrom by giving written notice to the Chair and sending a copy to the Executive Director.
- (b) At least thirty (30) business days prior to the date set for a hearing, the Chair of the Ethics Committee shall cause a letter to be delivered to the respondent and the complainant by courier service, that confirms delivery by a return receipt, notifying both parties of their right to have witnesses appear at the hearing and testify on their behalf. The letter shall also contain the names and business addresses of the Ethics Committee members and inform both parties of their right to object to participation by any Ethics Committee member in the hearing, as provided herein. Extensions in the date set for a hearing may be granted for up to thirty (30) days at the discretion of the Chair.
- (c) If any member of the Ethics Committee has been directly involved in matters relating to the complaint, the Chair shall remove that member from hearing the case. Within ten (10) days after receiving the notice of hearing, either party, for good cause shown, may file with the Chair a request to disqualify an Ethics Committee member or members from hearing the case. The Chair may consult with the member in question, at the Chair's discretion, and shall rule on the request. If the Chair has been directly involved in matters relating to the complaint or if the Chair's participation in hearing the case is challenged by a party, the President shall determine whether the Chair should be disqualified from hearing the case. If an Ethics Committee member or members are disqualified from hearing a case, the President shall appoint another qualified member or members to sit on the Ethics Committee for purposes of hearing that case.
- (d) At least thirty (30) business days prior to the date set for a hearing, the Chair shall instruct the Executive Director to issue a written summons to be issued and mailed by courier service, that confirms delivery by a return receipt, to IAAO members and nonmembers, including the complainant, who may have relevant evidence to present,

advising them of the time and place of the hearing and summoning them to appear and testify. The summons may also require that specified documentary evidence be produced for examination by the Ethics Committee either before or at the hearing. Failure of IAAO members to comply with summons without good cause shall result in ethics charges brought against them by the Ethics Committee. In addition, failure of the complainant without good cause to personally appear will result in the dismissal of the charges.

- (e) Reasonable expenses incurred by witnesses other than the complainant and the respondent in attending hearings may be reimbursed by IAAO, within budgetary parameters established in section 6.5.4 of these Procedural Rules.
- (f) After receiving notice of the hearing, neither the complainant nor the respondent, directly or through a representative, shall communicate with members of the Ethics Committee regarding the pending matter, except upon adequate notice to the other party and in circumstances allowing all parties to participate. Prior to the hearing, party communications with the Ethics Committee members shall be made through the Executive Director.
- (g) The complainant shall and the respondent may participate in all stages of the hearing prior to final committee deliberations. An appearance at the hearing without objection by the respondent and the complainant shall constitute a waiver of any defect in the notice of that hearing. If the respondent fails to appear at the duly noticed hearing without showing good cause to the Ethics Committee at least five (5) business days before the scheduled hearing, the Ethics Committee may proceed with the hearing in the absence of the respondent and make its decision based on the available evidence.
- (h) Failure of the respondent or complainant to appear without a showing of good cause to the Ethics Committee may result in disciplinary action against the respondent or complainant under the IAAO Code of Ethics and/or Standards of Professional Conduct.
- (i) The Chair of the Ethics Committee or the designated hearing examiner(s) shall arrange for transcribing or recording of the proceedings of the hearings.
- (j) The Ethics Committee shall not routinely hold any portion of a hearing by telephone, or other electronic means but may do so if neither party objects and if such a hearing will allow a full and fair presentation and consideration of the case.
- (k) The Chair shall preside at the hearing or designate the vice-chair or one of the other members to preside. The Chair or the Ethics Committee member presiding shall afford parties to an ethics hearing the full opportunity to be heard, to offer testimony of witnesses, and to present documentary evidence relating to the issues involved in the hearing, subject, however, to the exclusion of evidence the Chair or other presiding Ethics Committee member deems immaterial, irrelevant, or repetitious. In evidentiary matters, the Ethics Committee may consider the rules of evidence that are applicable in

a court of law. However, the Ethics Committee operate under relaxed rules of evidence and may consider all evidence that, in its opinion, fairness or justice requires to be considered.

- (l) The Chair or other presiding member shall have full authority to control the procedures of the hearing and the conduct of parties and their representatives, including, but not limited to, the following powers:
 - (1) to administer oaths and affirmations
 - (2) to rule upon the admissibility of evidence
 - (3) to establish time limits for presentation of testimony and other evidence to the Ethics Committee and for making of arguments to the Ethics Committee
 - (4) to exclude witnesses and other non-parties from the hearing when they are not giving testimony, and to exclude any person who becomes so disruptive or abusive that a full and fair hearing cannot be conducted
 - (5) to consider and rule upon motions and procedural requests
 - (6) to hold conferences for settlement or clarification of issues.
- (m) The Ethics Committee shall allow the complainant and the respondent to be accompanied by their legal counsel or other representatives at the hearing, and IAAO shall have its legal counsel present. Representatives may consult with and advise their clients and may examine and cross-examine principals and witnesses. However, representatives may not testify in place of their clients.
- (n) The hearing need not be continuous. The Chair or other presiding Ethics Committee member may recess the hearing whenever, in his or her reasonable judgment, fairness or convenience so requires.
- (o) The following shall be the order of proceeding at all Ethics Committee hearings, subject to modification by the Chair or other presiding Ethics Committee member for good cause:
 - (1) introduction of parties, committee members, and other participants
 - (2) reading of the letter of charge by the chair or other presiding Ethics Committee member unless reading is waived by both parties
 - (3) presentation, argument, and disposition of prehearing motions and procedural requests
 - (4) opening statements by the parties
 - (5) presentation of evidence
 - (6) closing statements by the parties.
- (p) The complainant shall have the burden of proof at all Ethics Committee hearings to establish, by the greater weight of evidence, that the respondent has violated the Code of Ethics and/or Standards of Professional Conduct.
- (q) If the complainant is the Ethics Committee, the complainant's role at the Ethics Committee hearing shall be assumed by one or more Ethics Committee members appointed by the Chair.

- (r) The complainant and the respondent, in that order, shall be given an opportunity to make statements to the Ethics Committee or directly or through their representatives, during the “opening statements” portion of the Ethics Committee hearing and to make further statements, directly or through their representatives, to the Ethics Committee during the “closing statements” portion of the hearing. Opening and closing statements may be used for the purpose of presenting arguments, rather than presenting evidence. Arguments shall not be allowed at any other time during the hearing, except with the permission of the chair or other presiding Ethics Committee member.
- (s) During the “presentation of evidence” portion of the Ethics Committee hearing, the complainant shall first introduce testimonial or documentary evidence to support those allegations of the letter of charge that have not been admitted by the respondent, provided, however, that no evidence shall be presented and no reference made as to any prior disciplinary action taken against or involving the respondent unless such prior disciplinary action involved the same substantive violation as is alleged in the pending matter. The complainant may testify and call witnesses (other than the respondent) to testify, either in narrative form or in response to questions from the complainant or his or her representative, provided that all such testimony shall be under oath administered by the Chair or other presiding Ethics Committee member. The respondent or his or her representative may then cross-examine the complainant and each witness presented by the complainant after his or her testimony is presented, and the Ethics Committee members may also ask questions of such persons.
- (t) During the “presentation of evidence” portion of the hearing and after the complainant’s case has been presented, the respondent may introduce testimonial or documentary evidence to rebut the allegations in the letter of charge and to support any affirmative defense raised by the respondent. The respondent may, but need not, testify and may call witnesses to testify, either in narrative form or in response to questions from the respondent or his or her representative, provided that all such testimony shall be under oath administered by the Chair or other presiding Ethics Committee member. The complainant or his or her representative may then cross-examine the respondent (if the respondent has testified) and each witness presented by the respondent after his or her testimony is presented, and the Ethics Committee members may also ask question of such persons.
- (u) The credibility of a witness may be questioned by any party, including the party calling the witness. If the Chair or other presiding Ethics Committee member determines that a witness is hostile to the party calling that witness, the party may examine that witness as if the witness were under cross-examination.
- (v) Upon written request by a party, presented to the Chair or other presiding Ethics Committee member at any time prior to the end of a hearing, the Ethics Committee shall make special findings upon any question(s) of fact and/or question(s) relating to application of the IAAO Code of Ethics and/or Standards of Professional Conduct, provided that no party shall be entitled to special findings on more than five (5) such questions at any hearing.

- (w) After conclusion of a hearing, the Ethics Committee or shall review the letter of charge, the respondent's reply, the complaint, the response, all materials submitted to the Ethics Committee along with the foregoing documents, and all evidence and testimony presented at the hearing. Within thirty (30) business days from the conclusion of the hearing, the Ethics Committee shall cause to be issued a decision to either (a) dismiss (b) reprimand, (c) suspend, or (d) expel, along with all special findings properly requested in accordance with these rules and procedures. The Ethics Committee's experience, technical competence, and specialized knowledge may be utilized in the evaluation of the evidence.
- (x) The Chair of the Ethics Committee draft a decision to the complainant and the respondent. Upon final approval of the Ethics Committee the decision will be forwarded to the Executive Director who then forwards copies to the complainant and the respondent by courier service that confirms delivery by a return receipt. The Ethics Committee decision shall include notice that the complainant and respondent have thirty (30) business days from receipt to file a written appeal. Appeals should be mailed to the attention of the Executive Director. A copy of the transcript or recording of the hearing will be made available at cost to the complainant or respondent upon request. The decision shall also advise the respondent that the discipline, if any, will be imposed after the time for appeal has expired.
- (y) A copy of the decision shall be mailed to the Executive Director.
- (z) If no appeal is received within thirty (30) business days, the decision of the Ethics Committee becomes final and effective on the day after the last day an appeal could have been properly filed.

3.6.1.8 *Appeal to the Ethics Appeal Panel*

- (a) The President shall appoint one or more hearing panels to consider appeals of the Ethics Committee's decisions. The hearing panel shall be chaired by the President and consist of three (3) other Executive Board members appointed by the President. Once appointed, the panel including the Chair shall remain intact until the matter is resolved.
- (b) The appeal shall be in writing and transmitted by courier service that confirms delivery by a return receipt, to the Executive Director. The appeal shall contain a succinct statement of the alleged error(s) and the reason(s) why the decision of the Ethics Committee is claimed to be incorrect. The Executive Director or designated member of staff will record the receipt of the appeal and shall transmit copies to each member of the hearing panel and the Ethics Committee.
- (c) If an appeal is requested, the discipline imposed shall be stayed until after the hearing panel issues its decision.
- (d) If any member or members of the hearing panel have a conflict of interest in matters relating to the complaint, the President shall disqualify them from hearing the appeal. If a member or members of the hearing panel are disqualified, the President shall appoint

another qualified member or members of the Executive Board to sit on the hearing panel for purposes of hearing the appeal.

- (e) The hearing panel shall meet as soon as is practical to hear the appeal. The appeal hearing shall be held in the city in which the Association is headquartered, unless it is decided by the Chair with the agreement of all parties to hold the hearing elsewhere. At least thirty (30) business days prior to the appeal hearing, the hearing panel shall cause notice to be issued by courier service that confirms delivery by a return receipt informing the respondent and complainant of the time and place of the appeal hearing. The notice shall also inform the respondent and complainant that legal counsel may be present, but that no witnesses may appear.
- (f) At the appeal hearing, the Chair of the Ethics Committee, or his or her representative, shall present the recording or transcript of the case and all evidence and shall summarize the case. Any party or counsel may be heard to correct the summary. Any counsel for a party may present the hearing panel with reasons why the decision of the Ethics Committee should or should not be followed, but only new and additional relevant evidence that was not available at the time of the Ethics Committee's hearing or evidence of procedural error by the Ethics Committee may be presented. Evidence that was clearly available at the time of the original hearing is not eligible to be submitted as new evidence.
- (g) At the conclusion of its hearing, the hearing panel shall, in executive session, vote to affirm, reject, or modify the decision of the Ethics Committee and shall cause to be issued to the respondent and the complainant a notification of its decision within thirty (30) business days of the appeal hearing. The notice shall be sent by courier service that confirms delivery by a return receipt. The members of the Ethics Committee and the Executive Director shall be notified by regular mail. Any modification of the decision of the Ethics Committee shall comply with the disciplinary action outlined in section 3.6.1.9 of these Procedural Rules.
- (h) All actions of the Ethics Committee shall be reported to the Executive Board by the Chair of the Ethics Committee only after the expiration of the appeal period described in sections 3.6.1.7(v), (w), (x), (y) and (z) of these Procedural Rules for the filing of an appeal to the hearing panel.

3.6.1.9 *Disciplinary Action*

- (a) If there has been no appeal from the decision of the Ethics Committee, such disciplinary action shall commence thirty-one (31) business days following the decision of the committee. If an appeal is affirmed or modified by the hearing panel, the disciplinary action approved by the hearing panel shall commence from the date the member(s) to be disciplined is (are) properly notified by courier service that confirms delivery by a return receipt of the final decision.
- (b) For purposes of these Procedural Rules, the words dismiss, reprimand, suspend, and expel shall be interpreted as follows:

- (1) *Dismiss.* If the Ethics Committee finds, that there is no merit in proceeding with the complaint that has been filed, a personal letter shall be sent by the Chair of the Ethics Committee to the respondent and the complainant indicating the dismissal of the complaint with no further action to be taken.
 - (2) *Reprimand.* A personal letter shall be sent by the Chair of the Ethics Committee to the respondent expressing disapproval of his or her conduct and explaining that the Ethics Committee will be monitoring the respondent's conduct for a period of not more than one (1) year from the date of the issuance of the Ethics Committee's decision. If the respondent is found to have violated the IAAO Code of Ethics and/or Standards of Professional Conduct during that period, he or she will be notified by the chair of the Ethics Committee. The respondent will retain all rights and privileges of membership during this period. This disciplinary action, including the respondent's name, shall be published in an IAAO publication. The respondent will be required to complete IAAO Course 171 on line within one (1) year of reprimand in order to continue as an IAAO member.
 - (3) *Suspend.* The respondent shall be denied the right to vote, serve on committees, participate as an instructor or a speaker at IAAO programs, or publicly represent the Association in any manner for a period of not more than two (2) years, beginning on the date of the Ethics Committee's decision. The respondent will retain all other rights and privileges of membership during this period. This disciplinary action, including the respondent's name, shall be published in an IAAO publication. The respondent will be required to complete IAAO Course 171 on line within one (1) year of suspension in order to continue as an IAAO member.
 - (4) *Expel.* The respondent shall have the rights and privileges of membership (including all certificates, awards, or professional designations conferred) revoked beginning on the date of the Ethics Committee's decision. This disciplinary action, including the respondent's name, shall be published in an IAAO publication. After a period of three (3) years, the expelled member may reapply to the Executive Board for membership. The respondent will be required to complete IAAO Course 171 on line within one (1) year before reinstatement of IAAO membership.
- (c) All final decisions that resulted in disciplinary actions under these rules shall be public information.

3.6.2 Self-Executing Provisions for Membership Suspension and Expulsion

If any member of the Association is indicted under any statutorily authorized legal proceeding for a felony or for an alleged crime of office that reflects on his or her professional or ethical conduct as set forth in the IAAO Code of Ethics and/or Standards of Professional Conduct, the Executive Director at the direction of the Chair shall send a letter by courier service, that confirms delivery by a return receipt to the indicted person:

- (a) Advising the member that he or she may wish to withdraw from IAAO activities during the period of indictment for his or her own benefit and the good of the Association.
- (b) Advising the member that he or she has the right to request a hearing under the Procedural Rules and show why his or her membership should not be suspended.
- (c) Advising the member that if he or she does not indicate his or her intention to withdraw from IAAO activities, or request a hearing, within thirty (30) days from the mailing of that letter, his or her membership shall automatically be suspended.

Automatic suspension shall take place as outlined above in instances in which neither a notice of intention to withdraw from IAAO activities nor a request for a hearing has been received within thirty (30) business days. Whenever any member has been convicted of a felony or a crime of office that reflects on his or her professional or ethical conduct as outlined in the IAAO Code of Ethics and/or Standards of Professional Conduct, that member shall be automatically expelled from Association membership.

Automatic expulsion shall take place if a member resigns while allegations of his or her misconduct are before the Ethics Committee. The expelled member's name shall be published in an IAAO publication.

3.6.3 Reinstatement of Membership

Whenever any member has been expelled from the Association for violations of the IAAO Code of Ethics and/or Standards of Professional Conduct or has resigned his or her membership while allegations of his or her misconduct were before the Ethics Committee, he or she may petition the Executive Board for reinstatement of membership after three (3) years. The Executive Board shall refer all such petitions to the Ethics Committee for its report and recommendations.

3.6.4 Retention of Case File

When the Ethics Committee or the hearing panel has declared any complaint proceedings ended, the Executive Director shall be so informed and all evidence compiled in such a case/hearing shall be delivered to the Executive Director, who will cause such file to be sealed and safely stored for a period of five (5) years, after which period the records shall be destroyed.

3.6.5 False Accusation

Reporting an accusation that is false or should have been known to be false is strictly prohibited. Any member(s) making an allegation that is knowingly false and damaging to an individual's reputation will be subject to ethics charges brought against them by the Ethics Committee.

3.6.6 Responsibility to the Association

Each member, by joining the Association or continuing membership in that organization, agrees that no complaint filed or action taken under these Procedural Rules with respect to a complaint shall subject the complainant or any person responsible for carrying out duties under these Procedural Rules or the IAAO Code of Ethics and/or Standards of Professional Conduct to

legal liability under the laws of defamation, nor shall the member complained of institute defamation proceedings.

4 SECTION 4. EXECUTIVE BOARD

4.1 OATH OF OFFICE

- (a) The President-Elect shall be given the Oath of Office before the general membership at the annual conference.
- (b) Board member(s) shall take the Oath of Office at or before their first board meeting.
- (c) Those taking the Oath of Office shall raise their right hand and repeat the Oath of Office, with the last sentence optional.
- (f) *Oath of Office:* I do solemnly swear that I will further the mission and the commitments of the International Association of Assessing Officers and that I will perform the duties and responsibilities of my office to the best of my abilities and in full accordance with the International Association of Assessing Officers Constitution, Bylaws, Procedural Rules, Code of Ethics, and Standards of Professional Conduct. So help me God.

January 17, 2014 Added (a) regarding administering the Oath of Office to the President-Elect and re-alphabetized section.

5 SECTION 5. DUTIES OF OFFICERS

5.1 DUTIES OF PRESIDENT

- 5.1.1 Shall make an annual report to the membership. Such report shall include, but not limited to, the Association's accomplishments. The report shall be published in an IAAO publication.
- 5.1.2 Shall have the power to require the resignation of any appointee who is not carrying out the responsibilities of the appointment.
- 5.1.3 Appoint one or more members in each state, province, or country to serve as IAAO Representative(s), whose duties shall include promoting membership and informing the Executive Board, officers, and members of local activities. In making those appointments, the President shall comply with the Procedural Rules.

5.2 DUTIES OF PRESIDENT-ELECT

- 5.2.1 Shall announce appointees to all committees, except the Conference Content Committee, and those made by the Vice-President in section 5.3.1 of these Procedural Rules, no later than November 1. Appointments are effective the following January 1.
- 5.2.2 Shall provide a list of Executive Board meeting location preferences to the Executive Director no later than May 1.
- 5.2.3 Shall coordinate the annual evaluation of the Executive Director.
- 5.2.4 Shall report on the financial condition of the organization at every Executive Board meeting in accordance with section 6.5.2.1 of these Procedural Rules.

5.3 DUTIES OF VICE-PRESIDENT

- 5.3.1 Shall appoint one (1) position on each standing committee that is effective upon ascension to office in section 5.2. Appointees shall be announced no later than November 1.
- 5.3.2 Become familiar with all aspects of planning, budgeting, management, and quality improvement of the Association by:
 - (1) Assisting the President-Elect in completing the annual evaluation of the Executive Director
 - (2) Working with the Executive Director in the preparation of the report to the membership at the annual conference.
- 5.3.3 Shall annually prepare an analysis of the "Travel, Preparation, Activity and Reporting Form(s)" and submit it to IAAO headquarters no later than December 31st. The analysis should include but is not limited to travelers relationship to IAAO, event information, needs discovered, follow-up actions, outcomes, travel payer (IAAO, inviter, shared).

April 26, 2014 Added 5.3.3 making the Vice-President responsible for an annual analysis of the "Travel, Preparation, Activity and Reporting Form(s)".

5.4 DUTIES OF IMMEDIATE PAST PRESIDENT

Shall serve as the chair of the Nominating Committee.

5.5 DUTIES OF EXECUTIVE DIRECTOR

5.5.1 Responsibilities of Executive Director

Shall include but not be limited to the following:

- (a) Establishing standards of productivity and performance of employees
- (b) Implementing the policies and programs of the Association and the mandates of the Executive Board
- (c) Determining job specifications for staff
- (d) Appointing, promoting, assigning, directing, and transferring personnel
- (e) Suspending, demoting, discharging, and disciplining personnel, or taking other appropriate action for any legitimate reason
- (f) Establishing reasonable work rules by developing and maintaining an employee policy manual
- (g) Establishing a nondiscriminatory employment policy
- (h) Establishing priorities for the coming year
- (i) Accepting, rejecting, or recommending modification to any submissions that will appear in any IAAO official channel of communication or official IAAO forum, including but not limited to publications, Web communications, advertising, letters to the editor, mailing list use, or any other communication media.

5.5.2 Reports to the Executive Board

5.5.2.1 Transmit all committee minutes within fifteen (15) days of receipt from the committee.

5.5.2.2 Transmit meeting agenda and committee reports not less than fifteen (15) days prior to the first day of the Executive Board meeting.

5.5.2.3 Transmit the "Travel, Preparation, Activity and Reporting Form(s)" not less than fifteen (15) days prior to the first day of the Executive Board meeting.

April 26, 2014 Added 5.5.2.4 regarding submitting the "Travel, Preparation, Activity and Reporting Form(s)".

5.6 DUTIES OF EXECUTIVE BOARD MEMBERS

(Reserved for future use)

6 SECTION 6. FUNDS

6.1 FISCAL YEAR

The fiscal year shall begin on January 1 and end on December 31.

6.2 AUDITOR APPOINTMENT

6.2.1 The Executive Director shall solicit bids for the auditing function for a period not to exceed five (5) years if such a contract for services would be beneficial to the Association.

6.2.2 The Executive Director shall select and recommend to the Executive Board an independent accounting firm to annually audit the Association funds and fiscal operations.

6.2.3 The accounting firm reports its results and recommendations to the Executive Director, who conveys the report to the Executive Board and membership.

6.2.5 The cover letter of the audit report or statement of condition of the Association from the independent auditing firm shall be published annually in an IAAO publication.

November 12, 2016 6.2.1 changed 3 years to 5 years; deleted 6.2.3 The same independent accounting firm shall not be retained for auditing purposes for more than five (5) consecutive years; replaced Audit Committee with Executive Director

6.3 FINANCIAL INSTITUTIONS AND ACCOUNTS

6.3.1 The Executive Director shall annually present a resolution(s) to the Executive Board of the Association for depositories of Association funds including checking, savings, and other financial funds. The Executive Board shall require adequate collateral and/or FDIC insurance from each financial institution used as a depository to ensure the safety of fund balances held with such financial institutions.

6.3.2 There shall be two (2) signatures required on all checks and disbursements drawn on the Association accounts. The Executive Director shall annually designate the employees authorized to sign checks or disburse Association funds. A sufficient number of employees shall be authorized as signatories to ensure prompt payment of Association bills.

6.3.3 All officers, agents, or employees of the Association having the authority to sign checks and disbursements, accept and process monies, and/or transfer monies or funds shall furnish bond and sureties in the following amounts:

Executive Director	\$1,000,000
Bookkeeper	\$200,000
Membership, Conference and Training Registrars	\$200,000
Conference Registration Personnel	\$200,000

The cost of such bonds shall be paid by the Association.

6.4 ADMINISTRATION OF ASSOCIATION FUNDS

- 6.4.1 The operational fund shall include all funds received by the Association unless said funds are designated for a special purpose, in which case a special fund for the designated purpose shall be established.
- 6.4.2 The Employee Pension Fund shall be handled by an institution designated by the Executive Board.
- 6.4.3 The Executive Director shall act as the contact between the Executive Board and the Barbara Brunner Scholarship Fund.
- 6.4.4 The Jeff Hunt, CAE, Memorial Candidates Assistance Trust consists of a five (5) person committee that shall manage the trust and designate an appropriate depository. The Executive Director shall administer the fund and direct staff to process applications and grants as approved by the trustees.
- 6.4.5 The Timothy N. Hagemann Membership Memorial Trust consists of a three (3) person committee that shall manage the trust and designate an appropriate depository. The Executive Director shall administer the fund and direct staff to process applications and grants as approved by the trustees.
- 6.4.6 The Paul V. Corusy Memorial Library Trust consists of a five (5) person committee that shall manage the trust and designate an appropriate depository. The Executive Director shall administer the fund and direct staff to process applications and grants as approved by the trustees.
- 6.4.7 The Executive Director shall act as the contact between the Executive Board and the IAAO Scholarship Fund.
- 6.4.8 The Association shall establish a restricted reserve fund for the purpose of meeting unforeseen extraordinary expenditures that arise outside of the normal budget process. Expenditures from this fund must first be reviewed and commented on by the Budget Committee and require Executive Board approval. This fund shall represent a minimum of three and one-half (3.5) months of operating expenses.

6.5 BUDGET PROCESS

6.5.1 Annual Budget Proposal

- 6.5.1.1 The proposed budget shall list any anticipated budget surpluses or deficits. In the case of a surplus, the committee's recommendation for use of the surplus funds will be included. The Executive Board shall comment and give guidance to the committee on the proposed annual budget. The Budget Committee shall present to the Executive Board the proposed budget for the succeeding fiscal year based on the following budget calendar:
 - (a) First quarter: Review of budget process, budget goals, and status of current budget;
 - (b) Second quarter: Set budget goals and assumptions for the succeeding fiscal year;

- (c) Third quarter: Review first budget draft containing all budget requests, obtained through interviews with committee chairs, department heads, the President-Elect, and others as appropriate. Adjust budget goals and assumptions as necessary;
- (d) Fourth quarter: Review final budget draft and make final adjustments;
- (e) Prior to end of fiscal year: Adopt budget for succeeding year.

April 5, 2013 Added the number 6.5.1.1.

6.5.1.2 The proposed budget shall list for each budget item the following:

- (a) current budget amount
- (b) actual amount to date
- (c) proposed budget amount
- (d) prior year actual amount
- (e) prior year budget amount.

6.5.1.3 The Executive Board shall adopt a budget of anticipated revenues and expenditures for the succeeding fiscal year, prior to the end of its current fiscal year. The activity of the Association shall be fiscally responsible.

6.5.1.4 The Budget Committee shall present to the Executive Board a proposed membership dues schedule and fees schedule, which shall be presented with the proposed annual budget.

6.5.1.5 A price differential for publications and programs shall be established for members and nonmembers. The Budget Committee shall present for adoption to the Executive Board a proposed schedule for the price differential, which shall be presented with the proposed annual budget.

6.5.2 Periodic Budget Reports

6.5.2.1 The Budget Committee shall present to the Executive Board at each of its meetings a budget report. The report shall list revenues and expenditures and shall list the (a) amount of budget approved, (b) amount of budget spent to date, and the difference between (a) and (b). A deficit in any budget item(s) shall be listed separately. A recommendation for suggested actions, including possible revisions to the budget, if necessary, shall also be included.

6.5.2.2 The report shall also summarize revenues and expenses, and changes in the operating fund balance. Additional information or charts may be included as part of the report to facilitate the presentation of the data.

6.5.2.3 The Executive Director shall furnish to the Executive Board and to the Budget Committee monthly budget reports as outlined in section 6.5.2.1 of these Procedural Rules. Included in this report shall be a narrative explanation for a deviation of ten percent (10%) or greater between actual and budgeted revenue or expenses, or where there is a deficit in the current month. A recommendation for suggested actions, including possible revisions to the budget, if necessary, shall also be included.

6.5.3 Budget Surplus and Deficit

6.5.3.1 Projected Surplus/Deficit

The Budget Committee shall report, in its periodic budget reports to the Executive Board, its best estimate of projected surplus/deficit of the budget for the current fiscal year.

6.5.3.2 Deficit Report

The Executive Director, acting in the capacity of Secretary-Treasurer, shall report to the Budget Committee within thirty (30) days any overrun in any budget item or account. Such report shall include the reasons for such overrun, the effect on the current budget, and any proposals, if necessary, for adjustments to the current operating funds.

6.5.3.3 Surplus Report

The Budget Committee shall report on the generation and accumulation of the surplus. Such surplus goal amount shall be directed by the Executive Board.

6.5.4 Expense Reimbursement

6.5.4.1 It is the policy of the Association to reimburse expenses of persons who engage in authorized travel on its behalf, subject to the following guidelines and categorical maximums.

6.5.4.2 A “day” is defined as an actual calendar day of a meeting or educational class. An additional one (1) day may be allowed if special circumstances warrant or if it can be demonstrated that there is an overall savings by the use of discounts in transportation and/or lodging by the additional day of travel. Approval must be granted by the Executive Director prior to the trip.

6.5.4.3 Specific Expense Categories

- (a) *Transportation.* The maximum reimbursable expense is equal to the total of direct coach airfare and any actual and necessary connecting bus, rapid transit, taxicab, or other public transportation fares. Automobiles and parking expenses are reimbursable to the extent that they displace airfare and taxi/public transportation fares; to the extent, if any, that they exceed airfare and taxi expenses they are not reimbursable. Parking expenses are reimbursed based upon actual documented expenses; automobile expenses are based upon a standard allowance following IRS published guidelines with the approval of the Executive Director. Intercity bus fares, and similar expenses are reimbursable on the basis of actual expenses up to the maximum defined by the combination of direct coach airfare and reasonable and necessary connecting ground transportation, as noted above.
- (b) *Lodging.* Reimbursement will be made for actual necessary expenses subject to a maximum equal to the lesser of the Association’s room rate, inclusive of taxes, or (if not applicable) the single room rate inclusive of taxes. No personal charges, such as personal telephone calls, will be reimbursed, nor will incremental charges incurred by an additional occupant of a room.
- (c) *Meals and Miscellaneous.* Expenses are reimbursable to a per diem amount established by the Executive Board.

October 11, 2013 Changed reimbursement maximum amount from \$54 per day to \$60 per day. October 17, 2014 changed the reimbursement maximum amount from \$60 per day to IRS standard rate for Kansas City (\$61), effective January 1, 2015. January 22, 2016 changed (c) to read: Expenses are reimbursable to a per diem amount established by the Executive Board

- (d) Upon prior written approval by the Executive Director, expense reimbursement for meals and miscellaneous may be regionally adjusted.
- (e) Entertainment costs, spouse's expenses, and any other unnecessary or personal charges are not reimbursable.
- (f) Reasonable communication expenses relating to approved committee project work, such as telephone, computer modem for data transfer, facsimile, and mail or other delivery service, are reimbursable.

6.5.4.4 Reimbursement Claims

- (a) All reimbursement requests shall be submitted on a reimbursement claim form approved by the Budget Committee. Reimbursement claims filed more than thirty (30) days following the end of the event for which the reimbursement is requested shall not be considered valid.
- (b) When requesting reimbursement for travel expenses IAAO staff, officers and board members shall file the Travel Preparation, Activity and Reporting Form except for Executive Board and committee meetings.
- (c) All actual expenses must be documented by means of legible photocopies of actual receipts to be reimbursed. The photocopies shall be submitted with the reimbursement claim. In the absence of actual receipts, the expense claim should be documented by a written note stating the date, amount, and reason for the expense.
- (d) All reimbursement claims shall be reviewed and approved by the Executive Director prior to payment. If any reimbursement claim is rejected or modified by the Executive Director, the person making such reimbursement claim may appeal such rejection or modification to the Budget Committee.

January 17, 2014 Added (b) requiring the Travel Preparation, Activity and Reporting Form and re-alphabetized section.

6.5.5 Executive Director and Staff Travel

6.5.5.1 All staff travel must be approved by the Executive Director prior to commencement of travel.

6.5.5.2 The Executive Director may be expected to pay costs for meals and social activities for others while representing the Association. These expenditures, which are not covered by section 6.5.4 of these Procedural Rules, will be reviewed by the Budget Committee for approval for reimbursement if explanatory comments are included listing the individuals and their relationship to the Association and purpose of the expense.

6.5.6 Officer Travel

6.5.6.1 The officers are expected to represent the Association at a variety of North American and non-North American meetings. For this purpose, officer travel will be a budget line item approved annually by the Executive Board. No travel will be reimbursed unless travel has the prior approval of the President or has the approval of two-thirds (2/3) of the Executive Board.

6.5.6.2 An officer may be expected to pay for meals and/or social activities for others while representing the Association. These expenditures, if not covered by section 6.5.4 of these Procedural Rules, will receive reimbursement approval if explanatory comments are included listing the individuals and their relationship to the Association and purpose of the expense. The Budget Committee will review all such expenditures and may disallow inappropriate claims for reimbursement. Disallowed claims shall be refunded by the officer or deducted from the next reimbursement request.

6.5.6.3 No officer shall be reimbursed for travel expenses in excess of the amount budgeted by the Executive Board for such travel unless approved by the Executive Board.

January 17, 2014 Removed requiring a Budget Committee recommendation and changed Executive Board vote needed from 2/3 to a simple majority.

6.5.6.4 Notwithstanding section 6.5.4.4(e), reimbursement will be paid from the officer's travel budget as approved by the Executive Board for one trip made by the IAAO President's spouse or companion, when the IAAO President is traveling on behalf of the Association. Spouse or companion travel to Association working meetings, such as Executive Board meetings, committee meetings, workshops, seminars, and the annual conference, are not reimbursable.

January 17, 2014 Changed "significant other" to "companion".

6.5.6.5 A monthly distribution of planned travel schedules for all persons to be reimbursed by the Association shall be distributed prior to the first day of each month to the Executive Board members. Travel not shown on the monthly schedules must be shown on the following month's report. The travel schedule is to list the person traveling, reason for travel, and dates of travel.

6.5.7 Member or Nonmember Travel

Members or nonmembers traveling on IAAO business may be reimbursed for reasonable travel expenses as specified in section 6.5.4 of these Procedural Rules with prior written approval by the Executive Director.

6.5.8 Honorarium

6.5.8.1 Members or nonmembers making presentations, speaking, or instructing at the IAAO Annual Conference shall not receive any honorarium or speaker fees except with prior written approval by the IAAO President and Executive Director and entering into a written agreement executed by the Executive Director.

6.5.8.2 Members or nonmembers making presentations, speaking, or instructing at any seminar, symposium, or conference sponsored by IAAO or any IAAO committee or subcommittee shall not receive any honorarium, speaker fees, reimbursements for travel

or lodging expenses except with the prior written approval of both the committee, subcommittee chair, or specific program chair thereof and the IAAO Executive Director. However, such persons making presentations, speaking, or instructing may receive complementary registrations at such sponsored events.

April 26, 2014 Removed references to councils and sections.

6.5.8.3 These provisions shall not apply to instructors for IAAO courses, workshops, or forums.

6.6 AUTHORIZATION TO BORROW FOR OPERATIONS

(Reserved for future use)

6.7 AUTHORIZATION TO BORROW FOR CAPITAL EXPENDITURES

(Reserved for future use)

6.8 CREATION OF SPECIAL OR MEMORIAL FUNDS

6.8.1 Special and memorial funds may be created by a majority vote of the Executive Board after application to the Executive Director. Special and memorial funds can be established for awards, grants, education, and research by individual members, related directly to the Association for a stated purpose.

6.8.2 Applications to establish special and memorial funds should state the following:

- (a) the name of the group, club, or network making the application if the application is for a member organization account
- (b) the name of the fund
- (c) the purpose of the fund
- (d) the duration of the fund
- (e) how the proceeds shall be distributed while active and upon dissolution
- (f) who will administer the program
- (g) any rules to determine recipients of grants or awards
- (h) trust agreements, if any
- (i) sources of fund assets
- (j) depository of fund assets.

April 26, 2014 Removed reference to councils and sections.

6.8.3 Unless provided otherwise, after two (2) years from the date of approval, the undistributed assets of a special or memorial fund will be placed in the Association general fund.

6.8.4 If any special or memorial fund is inactive for a two (2) year period, the undistributed assets of the fund will be placed in the Association general fund.

6.8.5 Unless otherwise provided, a special or memorial fund will be administered by the Executive Director and staff, and funds will be deposited with the financial institution approved by the Executive Board as a depository.

6.8.6 A majority vote of the Executive Board is necessary to close a special or memorial fund.

6.9 GIFTS AND GRANTS

- 6.9.1 Gifts and grants shall be accepted by the Executive Board and proper acknowledgment of the gift or grant shall be sent by the Executive Director to the donor(s) or grantor(s).
- 6.9.2 Gifts and grants shall be placed in the Association General Fund unless the gift or grant is made to a specific fund or for a special use.
- 6.9.3 Gifts or grants made for a specific use (i.e., purchase of equipment, real estate, etc.) shall be placed in a separate account until funds for that use are disbursed.
- 6.9.4 Gifts made to the Education Development Fund shall be placed in the restricted curriculum fund.

6.10 JOINT VENTURES

Any joint ventures to which IAAO is a party shall be governed by a written agreement, which incorporates the following general guidelines.

6.10.1 Establishment of Joint Venture Parameters

- (a) responsibility
- (b) deadline
- (c) failsafe

6.10.2 Personnel

- (a) provision
- (b) minimum or actual numbers
- (c) time to be allotted
- (d) cost

6.10.3 Financial Obligations

- (a) whose obligation
- (b) amount on a continuum from none to all
- (c) when provided
- (d) billings or other notification
- (e) if agreed, each party to pay its own specified costs

6.10.4 Event Failsafe

- (a) minimum number of participants
 - 1. at specified dollar amount, if applicable
- (b) a certain time for conditions to be met
- (c) event to be cancelled if (a) and/or (b) unmet
- (d) notice of cancellation
 - 1. when given
 - 2. to whom given

7 SECTION 7. MEETINGS

7.1 ANNUAL CONFERENCE

7.1.1 The Executive Board shall select and approve an annual conference city, based on the presentation made and a written evaluation prepared by the Director of Meetings.

The conference location shall rotate annually among the regions.

7.1.2 The Executive Board meeting at which the selection of the annual conference city is to be made shall not be held in a city that has been selected as one of the finalists.

Region 1

Alaska	Australia
Arizona	British Columbia
California	China
Colorado	Guam
Hawaii	Hong Kong
Idaho	Japan
Montana	Korea
Nevada	Manitoba
New Mexico	Mexico
Oregon	New Zealand
Utah	Philippines
Wyoming	Thailand
Washington	Yukon Territory

Region 2

Alabama	Botswana	Alberta
Arkansas	Cyprus	Manitoba
Illinois	Germany	Saskatchewan
Indiana	Great Britain, UK	
Iowa	Greece	
Kansas	Iceland	
Kentucky	Latvia	
Louisiana	Lithuania	
Minnesota	Mauritius	
Mississippi	Namibia	
Missouri	Netherlands	
Nebraska	Northern Ireland, UK	
North Dakota	Pakistan	
Oklahoma	Romania	
South Dakota	Russia	
Tennessee	Scotland, UK	
Texas	Slovenia	

Wisconsin South Africa
 South Wales, UK
 Spain
 Turkey
 Zambia

Region 3

Connecticut Barbados
Delaware Bahamas
District of Columbia Grenada
Florida Virgin Islands
Georgia
Maine
Maryland
Massachusetts
Michigan
New Hampshire
New Jersey
New York
North Carolina
Ohio
Pennsylvania
Rhode Island
New Brunswick
Newfoundland
Nova Scotia
Ontario
Quebec
South Carolina
Vermont
Virginia
West Virginia

7.1.3 Support Factors

The local chapter/affiliate, assessor's office, affiliate members, or group wishing to host an annual conference must have the ability to organize a Local Host Committee. The Local Host Committee has the responsibility of suggesting social activities, companion programs, and entertainment for the opening reception and banquet. The Director of Meetings will work with the Local Host Committee in these areas. The Local Host Committee may be called upon for additional conference assistance such as seeking donations and sponsors. (See section 11.4.2, Local Host Committee, of these Procedural Rules.)

7.2 AGENDA FOR MEETINGS

- (a) All agendas and minutes should be submitted to the Association within thirty (30) days of the date of the meeting.
- (b) The Association will act as the repository for all agendas and minutes.

7.3 EXECUTIVE BOARD MEETING RULES

7.3.1 All meetings of the Executive Board shall be conducted in accordance with Robert's Rules of Order, Revised.

7.3.2 Prior to their participation in any meeting of the Executive Board, new members of the Executive Board shall receive an orientation to the governing documents, strategic plan and budget for the Association and the legal and fiduciary responsibilities of the Executive Board.

7.3.3 The Secretary shall prepare the minutes for all meetings of the Executive Board. The minutes shall be signed by both the President and Secretary.

7.3.3.1 The minutes shall be available for all members within thirty (30) business days following the meeting.

7.3.5 Executive Board Vote

7.3.5.1 A vote may be taken at any official meeting of the Executive Board. It may be in person, by unanimous written consent provided there are no abstentions, or by a telephone-conference vote so long as all participants are able to communicate with each other.

7.3.5.2 The Executive Board shall consider any and all comments received concerning a proposal prior to the vote as prescribed by section 7.5 of these Procedural Rules.

7.3.5.3 The Executive Board shall consider the fiscal effects upon the Association as stated in the project plan submitted in accordance with section 7.6 of these Procedural Rules, prior to the vote.

7.4 MEMBERSHIP NOTICE

7.4.1 Executive Board Approval

7.4.1.1 Prior to adoption by the Executive Board, an announcement must be made to the membership for comment on any matters concerning the following:

- (a) Constitution
- (b) Code of Ethics and Standards of Professional Conduct
- (c) Bylaws
- (d) Technical Standards.

7.4.1.2 The proposed change to items under section 7.5.1.1 of the Procedural Rules (hereinafter referred to as the "proposal") shall be approved for membership review under section 7.5 of the Bylaws, prior to publication. The Executive Board may make such approval in accordance with section 7.5.3 of these Procedural Rules.

7.4.1.3 A notice of intent to adopt or amend a proposal shall be published in the first IAAO publication for which the deadline for publication has not passed or be sent to members prior to action by the Executive Board on such proposal.

7.4.1.4 The notice shall include

- (a) the wording of the section being amended, or if it is a new section or standard, the subject and intent of the proposal
- (b) a brief statement describing the intent and effect of the proposal
- (c) the period of time during which written comment on the proposal shall be accepted. This comment period shall be at least thirty (30) days from the time of the initial publication.

7.4.2 Membership Comment

7.4.2.1 The chair of the committee or member proposing such rule or standard shall comply with section 7.5.1 of these Procedural Rules.

7.4.2.2 All written comments received on the proposal shall be made available to the Executive Board.

7.4.2.3 The Executive Board shall consider any and all comments received concerning such proposal in its deliberations on the proposal prior to a vote.

7.4.2.4 A committee chair or member may at any time solicit comment and/or distribute it for review to experts on the subject.

7.4.3 Executive Board Vote

The vote shall be conducted in accordance with section 7.4.5 of these Procedural Rules.

7.5 PROJECT PLAN FORM

7.5.1 The Executive Director, committee chair, Executive Board members, and all other persons who have reason to make recommendations to the Executive Board that have a fiscal impact or effect on the Association's Strategic Plan must submit a Project Plan.

7.5.2 Such recommendations shall be transmitted to the Executive Director on the Association's current Project Plan Form.

7.6 COMMITTEES

- (a) Meeting Place: refer to section 11.1.1 of these Procedural Rules.
- (b) Number of Meetings: refer to section 11.1.2 of these Procedural Rules.

7.7 CHAPTERS

- (a) Refer to section 12.2.7 of these Procedural Rules.

7.8 BOARD MEETING SITE SELECTION

- (a) Prior to May 1, the President-Elect shall provide the Executive Director a list of potential sites and dates for the next year's Board meetings.
- (b) IAAO professional staff will research proposed meeting sites so that no Board meetings are held in a city that may be a viable candidate for the current year annual conference site selection.

8 SECTION 8. ELECTIONS

8.1 NOMINATING PROCESS

8.1.1 Nominating Committee Meeting

8.1.1.1 The Executive Director shall mail the chair and members of the Nominating Committee (hereinafter in this section called the committee) a copy of all nomination requests as soon as possible after receipt.

8.1.1.2 The Executive Director shall mail to all persons seeking nomination a copy of this section of the Procedural Rules prior to the meeting of the committee. The candidate questionnaire approved by the Executive Board must be completed and returned to the Executive Director for distribution to the committee no later than July 1.

8.1.1.3 The committee has the discretion to consider a candidate for an office who has not submitted a candidate questionnaire to the Executive Director, in accordance with section 8.1.1.2 of these Procedural Rules.

8.1.1.4 The committee shall meet via conference call for the purpose of establishing the agenda and protocol for any needed interview process no later than August 1. All members shall be notified of the date, time, and place of the meeting as soon as it is scheduled.

8.1.1.5 If the committee determines there is a need to conduct interviews with any of the candidates, the interview will be conducted via telephone prior to August 1.

April 26, 2014 Changed deadline from "prior to the IAAO annual conference" to "prior to August 1".

8.1.1.6 The Executive Director shall respond to any member's request for the names of candidates for the Executive Board who have submitted candidate questionnaires.

8.1.2 Selection Process

8.1.2.1 The committee shall consider requests for nomination and may also seek other individuals to be placed in nomination by the committee.

8.1.2.2 (Reserved for future use)

8.1.2.3 The committee shall first determine a potential candidate's qualifications for the position sought by examining whether the candidate:

- (a) is a member in good standing
- (b) is in the proper membership category
- (c) has been convicted of ethical violations or crimes of office
- (d) is in full compliance with the IAAO Bylaws and Procedural Rules.

8.1.2.4 In order to run for election for an Executive Board position, a candidate must:

- (a) have completed IAAO Workshop 171 Standards of Professional Practice and Ethics

- (b) furnish documentation that he or she complies with at least one in each of the following three categories:

Category A: Professional

1. holds an active IAAO designation
2. has attended and passed the examinations for at least three (3) thirty- (30-) hour IAAO courses (effective January 1, 2015).
3. is an IAAO accredited member
4. has served as an IAAO instructor
5. has served as a designation grader
6. has served as a professional designation advisor

April 26, 2014 Changed item 3. to clarify the meaning of "completed at least three IAAO courses".

June 24, 2014 Added the effective date of January 1, 2015 to 8.1.2.4 (b) 2.

Category B: Internal

7. has been a member of IAAO for at least five (5) years
8. has served on an IAAO committee
9. has served as an IAAO Representative
10. has served as an officer in a local chapter of IAAO

Category C: External

11. holds a state or provincial or country designation/certification
12. has attended at least two (2) IAAO annual conferences within the previous five (5) years
13. has authored an article in an IAAO publication within the last five (5) years
14. has served as an officer in an IAAO affiliate organization.

April 6, 2013 Reorganized section into categories A, B and C and added the language 'at least one in each of the following three (3) categories:' to 8.1.2.4 (b) and 'within the previous five (5) years' to item number 12.

8.1.2.5 In order to run for election for an officer position, a candidate must:

- (a) have served as an IAAO Executive Board member
- (b) not be a sitting regular Executive Board member.

8.1.2.6 The names of those members selected as candidates shall be certified by the committee chair to the Executive Director by August 15. The Executive Director shall post the list of candidates on the website immediately following certification and notification to the candidates. The Executive Director shall publicize the names of the members nominated in an IAAO publication as soon as possible.

January 17, 2014 Added language regarding posting the list of candidates to the website immediately following certification and notification.

April 26, 2014 Changed deadline from "by the close of annual conference" to "by August 15".

8.1.2.7 No candidate from any state or province or other comparable international jurisdiction shall be eligible to stand for election to an open Executive Board regular member position if there is a sitting member from that state or province or other comparable international jurisdiction whose term does not expire prior to the swearing in of the newly elected Executive Board regular member. This limitation shall not be construed to prevent an officer and an elected Executive Board member from the same state or province or other comparable international jurisdiction from serving concurrently.

8.1.2.8 The Executive Board associate member may be elected from a state, province, or country in which there is a sitting Executive Board regular member or from which there is another candidate for a Executive Board regular member position.

8.1.2.9 The Executive Board regular members shall be three members from each geographic region of IAAO. Regular member candidates shall be placed in their regions on the ballot according to their membership situs. The geographic makeup of the regions shall be determined by the Nominating Committee, subject to approval by the Executive Board. The geographic makeup of the regions shall be reexamined every five (5) years, beginning in 2012, to ensure equal representation of members within each region. A copy of the geographic areas will be kept with the Procedural Rules as Appendix A.

8.2 ELECTION PROCEDURE

8.2.1 Endorsements

8.2.1.1 IAAO shall not provide endorsement forms or oversight of endorsements.

8.2.1.2 Election endorsements shall not be included in the candidate's profile brochure or in any campaign advertisements appearing in IAAO publications or IAAO generated electronic media.

8.2.2 Candidate Profiles

8.2.2.1 In order for the candidate profile information to be sent with the official ballot, the Executive Director must receive the candidate profiles and photographs by July 1.

8.2.2.2 Profiles shall be limited to 1,800 characters, approximately two hundred and fifty (250) words, using the provided form.

8.2.2.3 The Executive Director will edit profile statements for style but will not edit for content.

8.2.2.4 The candidate profile brochure shall comply with the following:

- (a) Only IAAO professional designations will appear on the official ballot. All designations earned by the nominee may appear in the profile information.
- (b) The candidates' names appearing in the candidate profile brochure will be arranged by position and in alphabetical order by last name.
- (c) An indication of whether the candidate was nominated by the Nominating Committee or by petition.

8.3 NOMINATION BY PETITION

8.3.1 The petitions for nomination shall contain the following for each signatory:

- (a) the name, signature, jurisdiction/organization, state/province/country of each member
- (b) whether the member is a regular or associate member.

8.3.2 To allow the expeditious verification of nominating petitions, the following minimum standards shall be adhered to:

- (a) All names shall be clearly printed so that the identity of the signatory can be readily determined and verified. Those names that are not legible will be disallowed.
- (b) Only those signatures of regular and associate members, in good standing and whose dues are paid according to the records of IAAO at the central office, will be allowed.
- (c) After review by the Executive Director, he/she shall forward the results to the Nominating Committee, including a report on the number of signatures that were disallowed.
- (d) Upon verification that the petition submitted has a sufficient number of valid signatures, the candidate shall be certified as eligible for election for the position determined by membership situs and membership category.

8.4 BALLOT PROCEDURES

8.4.1 Ballot Procedures

8.4.1.1 Ballots and profiles shall be sent electronically to all regular members by November 1. Individuals who are regular members by October 1 shall be entitled to vote in the election.

8.4.1.2 A separate ballot shall be sent to all associate members in the year for which an election for the Executive Board associate member position occurs. Such ballot shall contain only the candidates for the Executive Board associate member position. Individuals who are associate members by October 1 shall be entitled to vote in the election.

8.4.1.3 An independent tabulating company shall be contracted by the Executive Board for the collection and counting of ballots and to certify the results of the election.

8.4.1.4 Returned ballots must be sent by November 30.

8.4.1.5 The following shall be considered invalid ballots for the position only and shall not invalidate the remaining positions:

- (a) Ballots for a regular member position for a write-in candidate who is from a state or province where there is a sitting Executive Board regular member whose term does not expire prior to the swearing in of the newly elected board member
- (b) Ballots for an Executive Board regular member position for a write-in candidate from a state or province the same as that of an Executive Board regular member candidate listed on the ballot, if cast for a different position than that of the candidate on the listed ballot
- (c) Ballots for Executive Board regular member positions for a write-in candidate from a state or province not within the geographic area designated for that position.

8.4.1.6 A vote for a write-in candidate, regardless of whether there is a check in the box beside the written-in name, shall be considered valid.

- 8.4.1.7 The certified results of the election, including the vote count, shall be delivered to the Executive Director by December 15.
- 8.4.1.8 The candidate receiving the highest number of votes in each position shall be elected to the position.
- 8.4.1.9 The Executive Director shall notify all candidates of the election results, including a regional vote count no later than December 22.
- 8.4.1.10 The Executive Board and Nominating Committee shall also be notified of the results no later than December 22.
- 8.4.1.11 The Executive Board shall receive from the Executive Director the certified election results at the Annual Executive Board meeting following the election.
- 8.4.1.12 The election results shall be published in an IAAO publication.
- 8.4.1.13 All ballots received, valid and invalid, shall be retained until the first Executive Board meeting following the December 31 deadline for challenging an election or, in the case of a challenge, until that challenge has been resolved, at which time the Executive Board may direct that the ballots be destroyed.

8.5 CAMPAIGN CONTRIBUTIONS AND EXPENSES

- 8.5.1 A candidate for a position as a member of the Executive Board shall not receive more than \$100 from any one member and more than \$500 from any one affiliate or chapter, and shall not expend more than \$5,000 in total for the campaign expenditures made by the candidate or in the candidate's behalf.
- 8.5.2 A candidate for the position of President-Elect or Vice-President shall not receive more than \$100 from any one member and more than \$500 from any one affiliate or chapter, and shall not expend more than \$10,000 in total for the campaign expenditures made by the candidate or in the candidate's behalf.

8.6 CAMPAIGN ADVERTISEMENTS

All campaign advertisements appearing in IAAO publications or IAAO-generated electronic media, prior to official nomination by the Nominating Committee, must clearly indicate that the individual is only a potential candidate.

8.7 Tie Vote

In the event that the membership fails to choose a successful candidate in any election by reason that no candidate received a plurality of the votes cast for any office or position, the Executive Director shall order a recount of the ballots to be made. If the results of the recount show that no candidate seeking the office or position received a plurality of the votes cast by the members, the Executive Board, at its next meeting, shall cast written ballots for the candidates who have received the equal number of votes. The candidate receiving a majority of the votes cast by the Executive Board shall be declared elected. If, after two such ballots by the

Executive Board, no candidate receives a majority of the votes of the Executive Board, the names of the candidates shall be drawn by lot and the name drawn shall be declared elected.

8.8 Automatic Recount

If the difference in the number of votes received by the two candidates receiving the most votes for the same position or office is less than one percent (1%) of the total votes cast for that position or office, the Executive Director shall order a recount of the ballots cast to be made.

8.9 Election Result Challenges

8.9.1 Candidates wishing to challenge election results must transmit challenges, in writing, to the Executive Director so that the challenges are received no later than the December 31 following the election. A member who is under challenge must not be sworn in until resolution of the challenge.

8.9.2 A \$500 cashier's or certified check, payable to the Association, shall accompany the written challenge. Any additional costs of recounting the ballots over the \$500 amount shall be assessed against the challenger. If the challenge results in a new winner being declared for the position challenged, all money paid by the challenger shall be refunded.

8.10 Definition of "Candidate"

The word "candidate," as used in the IAAO election rules, refers to persons who have done any of the following with respect to a specific IAAO election:

8.10.1 Been nominated by the Nominating Committee for any position.

8.10.2 Publicly declared that they are seeking an IAAO elective position for any election year.

8.10.3 Solicited contributions intended to support a campaign for an IAAO elective position, or endorsements for such a position, on their own behalf.

8.10.4 Made any campaign expenditures on their own behalf.

8.11 IAAO Staff and Elections

IAAO staff, including the Executive Director, shall remain neutral in all aspects of the campaign, nomination, and election of officers and Executive Board members. The Executive Director may be contacted concerning campaign, nomination, and election procedures.

8.12 IAAO Instructors and Elections

IAAO instructors, when instructing in the classroom, shall not engage in any political activity on behalf of themselves or other IAAO candidates.

8.13 Campaign Advertisements

All campaign advertisements appearing in IAAO publications or electronic media shall clearly indicate what person or organization paid for and/or sponsored the advertisements.

9 SECTION 9. AMENDMENTS

(Reserved for future use)

10 SECTION 10. PROFESSIONAL DESIGNATIONS

10.1 PROFESSIONAL DESIGNATIONS

The purpose of IAAO professional designations is to provide a program of certification that recognizes professionalism and competency in matters of property appraisal and assessment administration for tax purposes.

10.2 REQUIREMENTS FOR QUALIFICATION

Any member of IAAO may apply for candidacy for any designation in the Professional Designation Program. Formal application for candidacy must be completed on the required candidacy application form and sent to IAAO headquarters with the appropriate fee and documentation of qualifications.

10.2.1 Candidates must comply with the minimum requirements that are in effect at the time of their acceptance in the candidacy program.

10.2.2 With the approval of the application, the candidate is sent a list of specific requirements that have been satisfied and other relevant material.

10.2.3 The candidate is referred to a professional designation advisor who serves as a mentor throughout the candidacy process.

10.2.4 Candidates are approved for a period of five (5) years. An annual fee is required to maintain candidacy. Candidates may reapply for candidacy every five (5) years.

10.2.5 With a written request of the candidate, subject to approval by the Professional Designations Subcommittee, a candidacy may be extended for a period of one year for just cause.

January 24, 2015 Approved adding 10.2.5

10.3 SPECIFIC DESIGNATIONS

10.3.1 Certified Assessment Evaluator (CAE)

The purpose of the CAE designation is to recognize professionalism and competency in a wide range of matters covering property valuation for tax purposes, property tax administration, and property tax policy.

IAAO members may use this designation in conjunction with the valuation of a wide range of property types, property appraisal and assessment administration issues, and property tax policy statements in accordance with the IAAO commitment to excellence.

To qualify for the CAE designation, the following general requirements must be in place on the date of applying to sit for the comprehensive examination:

- (a) The candidate must have at least five (5) years of experience in property appraisal or assessment administration.

- (b) The candidate must have credit for the following seven (7) educational courses:
- (1) IAAO Course 101: Fundamentals of Real Property Appraisal
 - (2) IAAO Course 102: Income Approach to Valuation
 - (3) IAAO Course 400: Assessment Administration
 - (4) IAAO Course 112: Income Approach to Valuation II
 - (5) IAAO Course 311: Residential Modeling Concepts, or IAAO Course 312: Commercial/Industrial Modeling Concepts
 - (6) IAAO Workshop 171 Standards of Professional Practices and Ethics or IAAO online Standards of Practice and Professional Ethics Supplement
 - (7) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.

July 13, 2013 Added language to (6) for members outside the United States.

January 18, 2014 Changed requirement in (c) from six courses to seven; changed the language in (c) (6) for U.S. residents and non-U.S. residents.

July 18, 2014 Relocated (a) regarding being an IAAO member and candidate in good standing to section (c) below, renumbered and added a number for item (7).

- (c) Prior to applying for any exam or submitting any report under this section a candidate must be an IAAO member and a candidate in good standing in the CAE program. The candidate must have credit for two (2) projects, one on residential real property and one on commercial real property. It is a requirement that at least one (1) of the projects must be a real property demonstration narrative appraisal report.

- (1) There are three (3) acceptable residential projects. The candidate must satisfactorily complete one of the following:
 - a. A real property demonstration narrative appraisal report, using all recognized approaches to value, on a 1 to 4 unit residential property.
 - b. a real property demonstration narrative appraisal report, using all recognized approaches to value, on the computer-assisted valuation of a group of residential properties
 - c. an eight- (8-) hour residential case study examination. If the candidate does not successfully complete the case study requirement after two (2) attempts, a different project must be selected to fulfill this requirement.

July 13, 2013 Removed the word "single" from 10.3.1 (d) and added the word "narrative" to 10.3.1 (d) (1) b.

January 18, 2014 Added that one of the projects must be a "real" property demonstration narrative appraisal report to (d) and added "using all recognized approaches to value" to (d) (1) b.

July 18, 2014 Added first sentence in item (c).

January 24, 2015 amended (a) single family resident to "1 to 4 residential unit property"

- (2) There are three (3) acceptable commercial projects. The candidate must satisfactorily complete one of the following:

- a. A real property demonstration narrative appraisal report, using all recognized approaches to value, on an income-producing property (as defined in the “*Guide to Real Property Demonstration Appraisal Report Writing*”, or
- b. a real property demonstration narrative appraisal report, using all recognized approaches to value, on the computer-assisted valuation of a group of income-producing properties, or
- c. the Case Study Examination on the Mass Appraisal of Income-Producing Property. If the candidate does not successfully complete the case study requirement after two (2) attempts, a different project must be selected to fulfill this requirement.

July 13, 2013 Added the word “narrative” to 10.3.1 (d) (2) b.

January 24, 2015 added” If the candidate does not successfully complete the case study requirement after two (2) attempts, a different project must be selected to fulfill this requirement.” to c.

January 18, 2014 Added reference to the Guide to (2) a. and “using all recognized approaches to value” to (2) b.

- (3) Candidates holding the AAS, PPS, or CMS designation satisfy the requirements of section 10.3.1(c) (1) of these Procedural Rules. The candidate must complete an income-producing property demonstration narrative appraisal report to satisfy the demonstration narrative appraisal report requirement.
- (4) Candidates holding the RES designation who have met the requirements of section 10.3.1(c) (1) a of these Procedural Rules may complete either section 10.3 1(c) (2) a, b, or c; candidates holding the RES designation who have met the requirements of section 10.3.1 (c) (1) b or c must complete a demonstration narrative appraisal report. If this is completed on a residential property, the candidate must also complete section 10.3.1 (c) (2) c.
- (5) Candidates who are graduates of the University of British Columbia program referenced in section 10.5.2 of these Procedural Rules and received a 70% or higher grade on their computer-assisted valuation case study satisfy the requirements of section 10.3.1(c) (1) b.
- (6) Candidates on an equivalent property appraiser certification or licensing track administered by an organization, country, province, or state requiring successful completion of a property demonstration narrative appraisal report may seek a waiver of the IAAO single-property demonstration narrative appraisal report requirement by submitting the appraisal report approved by the organization, country, province, or state satisfying sections 10.3.1(c) (1) a and/or 10.3.1 (c) (2) a of these Procedural Rules provided that organization, country, province, or state has previously entered into a property demonstration appraisal report and grading standards waiver agreement with IAAO.
- (7) Candidates holding the Ad Valorem/Mass Appraisal – General designation from the American Society of Appraisers (ASA) may receive educational equivalencies for IAAO courses 101, 102, 112 and USPAP. Candidates may also receive credit via waiver(s) for IAAO real property demonstration appraisal report requirements in section 10.3.1(c)(1)a and

section 10.3.1(c)(2)a by submitting said reports to the Professional Designation Subcommittee.

- (8) Candidates holding the MAI designation from the Appraisal Institute (AI) may receive educational equivalencies for IAAO courses 101, 102, 112 and USPAP. Candidates may also receive credit via waiver(s) for IAAO real property demonstration appraisal report requirements in section 10.3.1(c)(1)a and section 10.3.1(c)(2)a by submitting said reports to the Professional Designation Subcommittee.

July 18, 2014 Changed references to 10.3.1(d) to 10.3.1(c) because of renumbering.

November 12, 2016 Added equivalencies for ASA and AI designees

- (d) The candidate must pass an eight- (8-) hour CAE Comprehensive Examination. This examination can be requested only after all other requirements are in place.
- (e) Upon successfully completing the CAE Comprehensive Examination, the candidate must submit an affidavit attesting to his or her experience before the designation can be conferred.
- (f) Members applying for candidacy on or after January 1, 2014, must, prior to sitting for the CAE comprehensive examination, hold a bachelor's degree (or equivalent) or higher from an accredited college or university. In lieu of a bachelor's degree, candidates must be a high school graduate (or equivalent) and satisfy one of the following options:
 - (1) Complete a minimum of thirty semester hours of specific subject area coursework or pass College-Level Examination Program (CLEP) exams equivalent from an accredited college or university with a grade of "C" or higher. Subject areas include: English Composition, Economics or Finance, Geography, Algebra, Geometry, Statistics or higher mathematics, Accounting, Business Law, Real Estate Law or Valuation. Three semester hours equals ten points; 100 points are required.
 - (2) A minimum of ten years of verifiable appraisal and/or assessment administration experience. One year of experience equals ten points; 100 points are required.
 - (3) Any combination of education and experience specified in section 10.3.1(f)(1) and (2) that equals 100 points.

July 13, 2013 Removed "or in lieu of the bachelor's degree, have equivalent semester credits as specified in the Appraiser Qualifications Board requirement." from 10.3.1 (h).

July 18, 2014 Removed high school graduate or equivalent requirement and renumbered.

November 12, 2016 amended (f) and added (1), (2), (3) to reflect the alternatives accepted in lieu of the bachelor's degree

10.3.2 Residential Evaluation Specialist (RES)

The purpose of the RES designation is to recognize professionalism and competency in the valuation of residential property for tax purposes.

IAAO members may use this designation in conjunction with the valuation of a wide range of property intended to be or used exclusively for residential purposes as it is customarily defined in their assessment jurisdiction in accordance with the IAAO commitment to excellence.

To qualify for the RES designation, the following general requirements must be in place on the date of applying to sit for the master examination.

- (a) The candidate must have at least three (3) years of experience in appraising residential real property.
- (b) The candidate must have credit for the following six (6) educational courses:
 - (1) IAAO Course 101: Fundamentals of Real Property Appraisal
 - (2) IAAO Course 102: Income Approach to Valuation
 - (3) IAAO Course 300: Fundamentals of Mass Appraisal
 - (4) IAAO Course 311: Residential Modeling Concepts
 - (5) IAAO Workshop 171 Standards of Professional Practices and Ethics or IAAO online Standard of Practice and Professional Ethics Supplement
 - (6) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.

July 13, 2013 Added language to (5) for members outside the United States.

January 18, 2014 Changed number of courses required from five to six in (c); changed requirements in (c) (6) for U.S. and non-U.S. residents.

July 18, 2014 Relocated (a) regarding being an IAAO member and candidate in good standing to section (c) below and renumbered.

January 24, 2015 approved (1) changing single family residence to "1 to 4 residential unit property"

- (c) Prior to applying for any exam or submitting any report under this section a candidate must be an IAAO member and a candidate in good standing in the RES program. The candidate must have satisfactorily completed one of the following:
 - (1) a real property demonstration narrative appraisal report, using all recognized approaches to value, on a 1 to 4 unit residential property
 - (2) a real property demonstration narrative appraisal report, using all recognized approaches to value, on the computer-assisted valuation of a group of residential properties
 - (3) an eight- (8-) hour case study examination and IAAO Course 201. If the candidate does not successfully complete the case study requirement after two (2) attempts, a different project must be selected to fulfill this requirement.
 - (4) If a candidate for the RES designation is also on an equivalent real property appraiser certification or licensing track administered by an organization, country, province, or state requiring successful completion of a real property demonstration appraisal report, the candidate may seek a waiver of the IAAO requirement by submitting the appraisal report approved by his or her organization, country, province, or state satisfying section 10.3.2(c) (1) of these Procedural Rules provided that the organization, country, province, or state has previously entered into a real property demonstration appraisal report and grading standards waiver agreement with IAAO.

- (5) Candidates who are graduates of the University of British Columbia program reference in section 10.5.2 of these Procedural Rules and received a 70% or higher grade on their computer-assisted valuation case study satisfy the requirements of section 10.3.2(c) 2.
- (6) Candidates holding the Ad Valorem/Mass Appraisal – Residential designation from the American Society of Appraisers (ASA) may receive educational equivalencies for IAAO courses 101, 300 and USPAP. Candidates may also receive credit via waiver for IAAO real property demonstration appraisal report requirement in section 10.3.2(c)(1) by submitting said report to the Professional Designation Subcommittee.
- (7) Candidates holding the SRA designation from the Appraisal Institute (AI) may receive educational equivalencies for IAAO courses 101, 102, 201 and USPAP. Candidates may also receive credit via waiver for IAAO real property demonstration appraisal report requirement in section 10.3.2(c)(1) by submitting said report to the Professional Designation Subcommittee.

July 18, 2014 Added first sentence in item (c).

November 12, 2016 Added equivalences for ASA and AI designees

- (d) The candidate must pass a four- (4-) hour RES Master Examination. This examination can be requested only after all other requirements are in place.
- (e) Upon successfully completing the RES Master Examination, the candidate must submit an affidavit attesting to his or her experience before the designation can be conferred.
- (f) Members applying for candidacy on or after January 1, 2014, must, prior to sitting for the RES master examination, hold an associate's degree (or equivalent) or higher from an accredited college or university. In lieu of an associate's degree, candidates must be a high school graduate (or equivalent) and satisfy one of the following options:
 - (1) Complete a minimum of twenty-one semester hours of specific subject area coursework or pass College-Level Examination Program (CLEP) exams equivalent from an accredited college or university with a grade of "C" or higher. Subject areas include: English Composition, Economics or Finance, Geography, Algebra, Geometry, Statistics or higher mathematics, Accounting, Business Law, Real Estate Law or Valuation. Three semester hours equals ten points; 70 points are required.
 - (2) A minimum of seven years verifiable appraisal and/or assessment administration experience. One year of experience equals ten points; 70 points are required.
 - (3) Any combination of education and experience specified in section 10.3.2(f)(1) and (2) that equals 70 points.

July 13, 2013 Removed "or in lieu of the Associate's degree, have equivalent semester credits as specified in the Appraiser Qualifications Board requirements." from 10.3.2. (h).

January 18, 2014 Added "using all recognized approaches to value" to (d) (2); added (i) requirement for a bachelor's degree effective January 1, 2015.

July 18, 2014 Removed high school graduate or equivalent requirement and renumbered.

November 12, 2016 amended (f) and added (1), (2), (3) to reflect the alternatives accepted in lieu of the bachelor's degree

10.3.3 Cadastral Mapping Specialist (CMS)

The purpose of the CMS designation is to recognize professionalism and competency in cadastral mapping techniques that support proper valuation for tax purposes, property tax administration, and property tax policy.

IAAO members may use this designation in conjunction with the production of maps and other graphic images and objects that support property appraisal and assessment administration in accordance with IAAO's commitment to excellence.

To qualify for the CMS designation, the following general requirements must be in place on the date of applying to sit for the CMS Master Examination.

- (a) The candidate must have at least three (3) years of experience in cadastral mapping.
- (b) The candidate must have credit for the following five (5) educational courses:
 - (1) IAAO Course 101: Fundamentals of Real Property Appraisal
 - (2) IAAO Course 600: Principles and Techniques of Mapping
 - (3) IAAO Course 601: Cadastral Mapping Methods and Applications
 - (4) IAAO Workshop 171 Standards of Professional Practice and Ethics or IAAO online Standard of Practice and Professional Ethics Supplement
 - (5) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. may provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course.

July 13, 2013 Added language to (4) for members outside the United States.

January 18, 2014 Changed the requirements in (c) (5) for U.S. residents and non-U.S. residents.

July 18, 2014 Relocated (a) regarding being an IAAO member and candidate in good standing, created section (c) below and renumbered. Changed reference in new (b) from four (4) educational courses to five (5).

- (c) Prior to applying for any exam or submitting any report under this section a candidate must be an IAAO member and a candidate in good standing in the CMS program.
- (d) The candidate must pass an eight- (8-) hour Case Problem on Cadastral Mapping.
- (e) The candidate must pass a four- (4-) hour CMS Master Examination. The examination can be requested only after all other requirements are in place.
- (f) Upon successfully completing the CMS Master Examination, the candidate must submit an affidavit attesting to his or her experience before the designation can be conferred.
- (g) The candidate must be a high school graduate or the equivalent.

10.3.4 Personal Property Specialist (PPS)

The purpose of the PPS designation is to recognize professionalism and competency in the valuation of personal property for tax purposes.

IAAO members may use this designation in conjunction with the valuation of a wide range of personal property as it is customarily defined in their assessment jurisdiction in accordance with the IAAO commitment to excellence.

To qualify for the PPS designation, the following general requirements must be in place on the date of applying to sit for the Master Examination.

- (a) The candidate must have at least three (3) years of experience in appraising any class of personal property or in administering a personal property valuation system.
- (b) The candidate must have credit for the five (5) following educational courses:
 - (1) IAAO Course 101: Fundamentals of Real Property Appraisal
 - (2) IAAO Course 102: Income Approach to Valuation or IAAO Course 112 Income Approach to Valuation II
 - (3) IAAO Course 500: Assessment of Personal Property
 - (4) IAAO Workshop 171 Standards of Professional Practice and Ethics or IAAO online Standards of Practice and Professional Ethics Supplement
 - (5) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required. PPS candidates may take a Foundation Approved 15-hour USPAP-PP course

July 13, 2013 Added language to (4) for members outside the United States.

January 18, 2014 Changed the requirements in (c) (5) for U.S. residents and non-U.S. residents.

July 18, 2014 Removed (a) which was a reference to candidates being IAAO members and PPS candidates in good standing and added it below in (d), renumbered section, and changed reference to four(4) educational courses in (b) to five (5).

- (c) The candidate must have credit for additional course(s) and/or workshop(s) of at least forty (40) credit hours on appraising personal property. Non-IAAO courses/seminars/workshops may be credited towards the forty (40) credit hours if approved by the Professional Designations Subcommittee. Seminars/workshops must consist of a minimum of three (3) instructional hours with an examination preferred, but not compulsory. The candidate is required to include a syllabus of the course when requesting equivalent credit, except for courses that have been pre-approved.
- (d) Prior to applying for any exam or submitting any report under this section a candidate must be an IAAO member and candidate in good standing in the PPS program. The candidate must have satisfactorily completed either:
 - (1) a personal property demonstration narrative appraisal report, using the recognized approaches to value, on a retail, service, or manufacturing business, or
 - (2) an eight- (8-) hour comprehensive case study examination. If the candidate does not successfully complete the case study requirement after two (2) attempts, a different project must be selected to fulfill this requirement.

- (e) The candidate must pass a four- (4-) hour PPS Master Examination. This examination can be requested only after all other requirements are in place.
- (f) Upon successfully completing the PPS Master Examination, the candidate must submit an affidavit attesting to his or her experience before the designation can be conferred.
- (g) Members applying for candidacy after January 1, 2017, must, prior to sitting for the PPS master examination, hold an associate's degree (or equivalent) or higher from an accredited college or university. In lieu of an associate's degree, candidates must be a high school graduate (or equivalent) and satisfy one of the following options:
 - (1) Complete a minimum of twenty-one semester hours of specific subject area coursework or pass College-Level Examination Program (CLEP) exams equivalent from an accredited college or university with a grade of "C" or higher. Subject areas include: English Composition, Economics or Finance, Geography, Algebra, Geometry, Statistics or higher mathematics, Accounting, Business Law, Real Estate Law or Valuation. Three semester hours equals ten points; 70 points are required.
 - (2) A minimum of seven years of verifiable appraisal and/or assessment administration experience. One year of experience equals ten points; 70 points are required.
 - (3) Any combination of education and experience specified in section 10.3.4(g)(1) and (2) that equals 70 points.

July 18, 2014 Added the first sentence in (d) and renumbered.

January 24, 2015 approved amending (c) it must consist of at least thirty (30) instructional hours and a final examination to "if approved by the Professional Designations Subcommittee. The candidate is required to include a syllabus of the course when requesting equivalent credit, except for courses that have been pre-approved."

November 12, 2016 amended (g) and added (1), (2), (3) to reflect new education requirements

10.3.5 Assessment Administration Specialist (AAS)

The purpose of the AAS designation is to recognize professionalism and competency in the administration of a variety of functions for property tax purposes.

IAAO members may use this designation in conjunction with administrative and tax policy matters in accordance with the IAAO commitment to excellence.

To qualify for the AAS designation, the following general requirements must be in place on the date of applying to sit for the Master Examination.

- (a) The candidate must have at least three (3) years of experience in the assessment field.
- (b) The candidate must have credit for the following six (6) educational courses:
 - (1) IAAO Course 101: Fundamentals of Real Property Appraisal
 - (2) IAAO Course 102. Income Approach to Valuation
 - (3) IAAO Course 400: Assessment Administration
 - (4) IAAO Course 402: Tax Policy
 - (5) IAAO Workshop 171 Standards of Professional Practices and Ethics or IAAO online Standard of Practice and Professional Ethics Supplement.
 - (6) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be

challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.

July 13, 2013 Added language to (6) for members outside the United States.

January 18, 2014 Changed the requirements in (c) (6) for U.S. residents and non-U.S. residents.

July 18, 2014 Removed (a) which was a reference to candidates being IAAO members and AAS candidates in good standing and added it below in (d), renumbered section, and changed reference to five(5) educational courses in (b) to six (6).

- (c) In addition to the above educational requirements, the candidate must have credit for an IAAO course from the 300 series.
- (d) Prior to applying for any exam or submitting any report under this section a candidate must be an IAAO member and a candidate in good standing in the AAS program. The candidate must have satisfactorily completed one of the following:
 - (1) an assessment administration case study examination
 - (2) an assessment administration research project
 - (3) an evaluation of a jurisdiction's assessment practices.
 - (4) If the candidate does not successfully complete the chosen requirement after two (2) attempts, a different requirement must be selected.
- (e) The candidate must pass a four- (4-) hour AAS Master Examination. This examination can be requested only after all other requirements are in place.
- (f) Upon successfully completing the AAS Master Examination, the candidate must submit an affidavit attesting to experience before the designation can be conferred.
- (g) The candidate must be a high school graduate or the equivalent.

July 18, 2014 Added the first sentence in (d) and renumbered the section.

January 24, 2015, added the number (4) to the existing document.

10.3.6 Mass Appraisal Specialist (MAS)

The purpose of the MAS designation is to recognize professionalism and competency in the discipline of mass appraisal of real property for tax purposes.

IAAO members may use this designation in conjunction with the valuation of a wide range of real property types in accordance with IAAO's commitment to excellence.

To qualify for the MAS designation, the following general requirements must be in place by the date of applying to sit for the Master examination.

- (a) The candidate must be a member of IAAO in good standing and a candidate in the MAS program.
- (b) The candidate must have at least three (3) years of experience in mass appraisal of real property.
- (c) The candidate must have credit for the following seven (7) educational courses:
 - (1) IAAO Course 101: Fundamentals of Real Property Appraisal
 - (2) IAAO Course 102: Income Approach to Valuation
 - (3) IAAO Course 300: Fundamentals of Mass Appraisal

- (4) IAAO Course 331: Mass Appraisal Practices and Procedures
 - (5) IAAO Course 332: Modeling Concepts
 - (6) IAAO Course 333: Modeling Application
 - (7) IAAO Workshop 171 Standards of Professional Practices and Ethics or IAAO online Standard of Practice and Professional Ethics Supplement.
 - (8) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.
- (d) Prior to applying for any exam or submitting any report under this section, a candidate must be an IAAO member and a candidate in good standing in the MAS program. The candidate must have satisfactorily completed one of the following:
- (1) A real property demonstration report using all three approaches to value on a universe of residential properties
 - (2) A real property demonstration report using all three approaches to value on a universe of commercial income producing properties
 - (3) A capstone real property demonstration report using all three approaches to value on a universe of properties
- (e) The candidate must pass a four-hour MAS Master Examination. This examination can be requested only after all other requirements are in place.
- (f) Upon successfully completing the MAS Master Examination, the candidate must submit an affidavit attesting to experience before the designation can be conferred.
- (g) The candidate must, prior to sitting for the MAS master examination, hold an associate's degree (or equivalent) or higher from an accredited college or university. In lieu of an associate's degree, candidates must be a high school graduate (or equivalent) and satisfy one of the following options:
- (1) Complete a minimum of twenty-one semester hours of specific area coursework or pass College-Level Examination Program (CLEP) exams equivalent from an accredited college or university with a grade of "C" or higher. Subject areas include: English Composition, Economics or Finance, Geography, Algebra, Geometry, Statistics or higher mathematics, Accounting, Business Law, Real Estate Law or Valuation. Three semester hours equals ten points; 70 points are required.
 - (2) A minimum of seven years of verifiable mass appraisal and/or assessment administration experience. One year of experience equals ten points; 70 points are required.
 - (3) Any combination of education and experience specified in section 10.3.6(g)(1) and (2) that equals 70 points.

November 12, 2016 amended (g) to include alternative to the bachelor's degree requirement

10.4 EXAMINATIONS

10.4.1 The CAE Comprehensive Examination

10.4.1.1 The written CAE examination is designed to test the candidate's knowledge of appraisal methodology principles, and techniques and of assessment theory, practice, procedures, standards, and administration. It is comprehensive in nature, and the

candidate is allotted a maximum of eight (8) hours for completion. Specific information on form and content of the examination will be provided to eligible candidates prior to sitting for it.

10.4.1.2 The examination is given only after all general requirements have been satisfactorily completed. The examination may be administered by a proctor at any location and on any date; it is preferred that the proctor be a CAE designee. The Professional Designations Subcommittee may authorize a non-designee to proctor the examination. Proctors cannot be related to the candidate, nor may they proctor if there is any potential conflict of interest. An oral examination may be required at the discretion of the Professional Designations Subcommittee.

10.4.1.3 A candidate failing the comprehensive CAE examination is permitted to retake it after thirty (30) days. If the candidate fails the re-examination, then he or she must successfully complete IAAO courses that reflect weak points from this examination before any subsequent attempt at the comprehensive Master Examination. The Professional Designations Subcommittee will review the failed examination and determine a remedial action plan for the candidate specifying which IAAO course(s) must be successfully completed.

November 12, 2016 removed This examination can only be retaken once.

10.4.1.4 A candidate who fails the comprehensive CAE examination and received credit for the demonstration appraisal via waiver will be subject to the requirements of 10.4.1.3.

November 12, 2016 added will be subject to the requirements of 10.4.1.4 and removed must have that demonstration appraisal submitted to IAAO for grading prior to retaking the examination.

10.4.2 The Master Examinations (RES, CMS, PPS, AAS, MAS)

10.4.2.1 The written Master Examination for the RES, CMS, PPS, AAS or MAS designation is specific to the subject. It is a test of competence, testing the candidate's knowledge of the specific subject. Specific instructions on the form and content of the examination are provided to the candidate prior to sitting for the examination. The examination is given only after all general and specific requirements have been satisfactorily completed.

November 12, 2016 added the MAS

10.4.2.2 The examination may be administered by a proctor at any location and on any date; it is preferred that the proctor be a CAE designee or a designation holder in the specialty. However, the Professional Designations Subcommittee may authorize a non-designee to proctor the examination. Proctors cannot be related to the candidate, nor may they proctor if there is any potential conflict of interest. An oral examination may be required at the discretion of the Professional Designations Subcommittee.

10.4.2.3 A candidate failing a Master Examination is permitted to retake it after thirty (30) days. If the candidate fails the re-examination, then he or she must successfully complete IAAO courses that reflect weak points from this examination before any subsequent attempt at the Master Examination toward *any* designation. The Professional Designations Subcommittee will review the failed examination and determine a remedial action plan for the candidate specifying which IAAO course(s) must be successfully completed.

November 12, 2016 removed This examination can only be retaken once

10.4.2.4 A candidate who fails the Master Examination and received credit for the demonstration appraisal via waiver will be subject to the requirements of 10.4.2.3. *November 12, 2016 added will be subject to the requirements of 10.4.2.4 and removed must have that demonstration appraisal submitted to IAAO for grading prior to retaking the examination*

10.5 EDUCATION CREDIT REQUIREMENTS

10.5.1 Challenging the Examinations

All IAAO course examinations, with exception of the examination on Standards of Practice and Professional Ethics, may be challenged without the requirement of attending the class. However, it is strongly recommended that all courses be taken in a classroom environment. Successfully challenged IAAO examinations qualify for credit.

10.5.2 University of British Columbia Real Estate Program

- (a) Candidates satisfactorily completing the Certificate Program in Real Property Assessment, the Diploma Program in Urban Land Economics (DULE), or the Bachelor of Business in Real Estate Degree (BBRE) from the University of British Columbia may receive educational equivalencies for all IAAO educational courses required in the CAE and RES program.
- (b) Candidates may receive credit via waiver(s) of IAAO real property demonstration appraisal report requirements in section 10.3.1(c)(1)a or b, section 10.3.1(c)(2)a or b and section 10.3.2(c)(1) or (2) by submitting said report(s) to the Professional Designation Subcommittee.
- (c) Further, candidates are required to complete IAAO 171 Standards of Professional Practice and Ethics or IAAO online Standard of Practices and Professional Ethics Supplement.
- (d) Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.
- (e) Additionally, the BBRE is recognized as satisfying the bachelor's degree requirement for the CAE and RES designations.

July 13, 2013 Added language to 10.5.2 for members outside the United States.

January 18, 2014 Added alpha (a) and (b) and text to (b) regarding requirements for U.S. residents and non-U.S. residents.

November 12, 2016 amended to add the DULE and the BBRE programs and included credit waiver for demonstration reports.

10.5.3 Reserved for Future Educational/Certificate Program

July 13, 2013 Deleted language in 10.5.3. Program no longer available.

10.5.4 Workshops

The IAAO annual mapping and personal property seminars, the Mapping Workshop, and the Valuation of Machinery and Equipment Workshop qualify for credit in their respective specialties. Other workshops or seminars will be evaluated on an individual basis.

10.5.5 The Standards of Practice and Professional Ethics Workshop

As of January 1, 2013, all candidates and designees who are not residents of the United States will adhere to the specific appraisal standards of their jurisdiction as well as the IAAO Standards of Professional Practices and Ethics.

July 13, 2013 Added language for members outside the United States.

10.6 EXPERIENCE CREDIT REQUIREMENTS

10.6.1 General Provisions

10.6.1.1 Each candidate must complete an experience record form.

10.6.1.2 For the CAE designation, the candidate must have five (5) years of experience in the appraisal of property and or in property assessment administration.

10.6.1.3 For the specialty RES, CMS, PPS, AAS, and MAS designations, the candidate must have three (3) years of experience in the appropriate field. General experience is not applicable.

10.6.1.4 For the CAE designation, up to one (1) year of experience credit may be granted for four (4) additional courses, at the discretion of the Professional Designations Subcommittee. The courses must be different from those used to meet the education requirements.

10.6.2 The Demonstration Appraisal Report

10.6.2.1 The purpose of the demonstration appraisal report is to demonstrate the candidate's knowledge of the principles of the appraisal process and his or her ability to explain clearly the reasoning that led to a final value conclusion. The Guide to Real Property Demonstration Appraisal Report Writing and the Guide to Personal Property Demonstration Appraisal Report Writing are the IAAO official guides for writing reports.

10.6.2.2 An appraisal report must be an actual appraisal using facts about an existing property or a group of properties. The effective date of the appraisal in the demonstration appraisal report must be within five (5) years of the date the report is submitted to IAAO. Candidates are advised of the pass/fail status of the report and the recommendations of the Professional Designations Subcommittee. Failed reports can be revised only once and must be re-submitted within one year of notification.

January 24, 2015 approved to add "and must be re-submitted within one year of notification."

10.6.2.3 All submitted demonstration appraisal reports become the property of IAAO and will not be returned to the candidate. Therefore, candidates are instructed to retain a copy of their report.

10.6.2.4 A demonstration appraisal report must be sufficiently comprehensive to provide the committee with a total picture of the subject property, a complete understanding of each step in the appraisal process, and an analysis of the application of the appropriate approaches to value. The candidate must state in each report what was done, why it was

done, and how it was done. Unless an appraisal report includes all of the steps in the application of the appropriate approaches to value and they are properly executed and explained, it will not be deemed a passing report. The judgment of the committee will be based upon how convincingly the candidate/author supports the final value estimate with reference to the approaches to value and justifies the conclusions.

10.6.2.5 The candidate, before writing a demonstration appraisal report, must read and carefully follow the applicable demonstration appraisal report writing guide. Guides are available for real property appraisals and personal property appraisals. Guides are available to members through the IAAO Website. The guides include all the official IAAO guidelines for writing demonstration reports. It is very helpful for the candidate to complete all educational requirements before writing and submitting the demonstration appraisal report.

10.6.2.6 No numerical grades are released for the demonstration appraisal reports. Like all requirements, the reports are scored on a pass/fail basis only.

10.6.2.7 All real property demonstration appraisal reports must be accompanied by a Data Verification Form. This form requires factual data on the comparables used in the report. All information submitted must be approved by the Professional Designations Subcommittee before any appraisal report is accepted.

10.6.2.8 A demonstration appraisal report that has failed twice must be reviewed by the Professional Designations Subcommittee chair before being released to the candidate.

10.6.3 The Computer-Assisted Valuation Report

10.6.3.1 The candidate choosing this option is required to prepare a demonstration appraisal report utilizing the computer-assisted valuation technique. This report must demonstrate the candidate's expertise in developing, applying, and maintaining computer-based mass appraisal systems. The report must focus on the application of computer-based statistical modeling techniques being applied to a mass valuation of a group of properties. Proper assessment ratio techniques must be applied in analyzing assessment equity before and after the valuation. The valuation of the subject properties must be accomplished by applying proper model development and calibration techniques. The assessment-ratio study procedures, valuation procedures, and achieved measures of assessment level and equity must meet appropriate standards.

10.6.3.2 Specific information on the requirements for this report is contained in the Guide to Real Property Demonstration Appraisal Report Writing. Candidates choosing this option must read and carefully follow the instructions in this guide before developing the demonstration report.

10.6.3.3 The computer-assisted valuation report is graded according to the methods used in grading other demonstration appraisal reports. No numerical grades are released. Computer-assisted residential valuation reports are scored on a pass/fail basis only. Failed reports can be revised only once.

10.6.4 The Mass Appraisal Case Study Examination

10.6.4.1 The Mass Appraisal Case Study Examination is an eight- (8-) hour, comprehensive multiple-choice examination that focuses on the valuation of income-producing properties. This examination requires the candidate to demonstrate knowledge of the assessment process and mass appraisal techniques as they are applied to a group of income-producing properties. Specific information on the form and content of the examination is provided to the candidate before the examination is arranged.

10.6.4.2 A candidate failing the examination is permitted to retake the examination after thirty (30) days. The candidate who fails the Case Study Examination twice must complete a demonstration appraisal report on an income-producing property in order to continue toward the CAE designation.

10.6.5 The Case Problem on Cadastral Mapping

10.6.5.1 The Case Problem on Cadastral Mapping is an eight- (8-) hour cadastral mapping exercise. The candidate is provided with a base map, aerial photograph, subdivision plat, and several deeds. The candidate must plot the deed and subdivision descriptions and resolve technical inconsistencies. Successfully completing the Case Problem requires technical and mapping problem-solving skills.

10.6.5.2 A candidate who fails the Case Problem is allowed to retake it once, after thirty (30) days.

10.7 OTHER PROGRAM INFORMATION

10.7.1 Location and Date of Examinations

All Professional Designation Program examinations may be taken at any location at any time. However, the comprehensive and master examinations may be taken only after all other requirements have been met.

10.7.2 Proctoring Examinations

10.7.2.1 All examinations must be proctored. A CAE designee is preferred in proctoring any examination. However, persons holding a specialty designation can proctor examinations in those specialties. The Professional Designations Subcommittee may authorize a non-designee to proctor any examination. Proctors cannot be related to the candidate. Proctors must avoid any and all conflicts of interest or perceptions of impropriety.

10.7.2.2 All examinations must be proctored. A CAE designee is preferred in proctoring any examination. However, persons holding a specialty designation can proctor examinations in those specialties. The Professional Designations Subcommittee has the authority to remove and/or dismiss any proctor for failure to comply with proctoring rules. Proctors must avoid any and all conflicts of interest or perceptions of impropriety.

10.7.3 Grades

All Professional Designation Program examinations are graded on a pass/fail basis only. A passing grade is seventy percent (70%).

10.7.4 Appeals

Demonstration appraisal reports failed on second grading may be appealed to the Professional Designations Subcommittee. The appeal must be on the proper form, must be signed by the candidate, and must identify the specific areas appealed. Complete information will be sent to the candidate on request.

10.7.5 Legal Conflict

If any of the requirements set forth in these professional designation requirements are in conflict with the laws of any country, a request for waiver, stating the conflict, is to be forwarded to the Professional Designations Subcommittee for its consideration.

10.7.6 Graders

10.7.6.1 The Professional Designations Subcommittee appoints graders of demonstration appraisal reports and the case problems.

10.7.6.2 The Professional Designations Subcommittee annually appoints grading chairs for residential, commercial, and personal property reports. It also appoints a grading chair for the case problems. The grading chairs help instruct the annual graders workshop.

10.7.6.3 The Professional Designations Subcommittee provides grader training online or at the IAAO Annual Conference. Real property report graders must complete a graders workshop once every three (3) years in order to be an approved grader. Inactive graders are not permitted to grade except in emergencies. The Professional Designations Subcommittee may identify classes of graders.

10.7.6.4 To become a real property report grader, an individual must hold the CAE, RES, or MAS; have passed a demonstration appraisal report in the grading area; attend the graders workshop; perform a trainee grading; and be approved by the Professional Designations Subcommittee.

January 18, 2014 Added provision for online grader training and changed the word "attend" to "complete" in 10.7.6.3.

10.7.7 Awarding the Designation

After all requirements for the professional designation have been completed, candidates must submit an affidavit stating that, if designated, they will abide by the IAAO Code of Ethics and Standards of Professional Conduct and by all Procedural Rules. The Professional Designations Subcommittee will vote for approval of the appropriate designation. This process can be done either at a regular committee meeting or by e-mail.

January 24, 2015 amended then approve and confer to "vote for approval of"

10.8 EVIDENCE OF THE DESIGNATION

10.8.1 A certificate of designation and a designation lapel pin are issued to each designee certified by IAAO. The certificate designation, the designation lapel pin, and other such evidence of the designation issued at any time to a designee remain the permanent property of IAAO and must be returned promptly to IAAO upon request of the Executive Board.

10.8.2 The designation logo shall not be used in any manner on letterhead, business cards, and the like without it being affixed as an identifier to the name of the individual on whom

the designation was conferred. Questions concerning the use of the designation logo must be forwarded to the Professional Designations Subcommittee.

- 10.8.3 Members of IAAO who have been awarded the CAE, RES, CMS, PPS, AAS , or MAS professional designation should identify themselves with the official abbreviation of their designation. The official abbreviations are as follows: “CAE” for the words Certified Assessment Evaluator; “RES” for the words Residential Evaluation Specialist; “CMS” for the words Cadastral Mapping Specialist; “PPS” for the words Personal Property Specialist, “AAS” for the words Assessment Administration Specialist; and “MAS” for the words Mass Appraisal Specialist” (the abbreviations do not have periods between the letters).

November 12, 2016 added the MAS Mass Appraisal Specialist wording

- 10.8.4 An individual may hold any combination of the CAE, RES, CMS, PPS, AAS, and MAS designations simultaneously.

November 12, 2016 added MAS

- 10.8.5 It shall be unlawful for any person, firm, or corporation to use or display in any form an IAAO designation logo without the expressed written consent of the Association. The Association reserves the right to prosecute violators.

10.9 TERMINATION OF DESIGNATION

- 10.9.1 When the designation of an individual is terminated by resignation or expulsion or for any other reason, the individual shall not use or display the designation in signing correspondence or stating qualifications, in credentials for appraisal reports, or in any other manner. Individuals faced with such a circumstance must return the certificate of designation, the designation lapel pin, and any and all other evidence of the designation to IAAO headquarters.

- 10.9.2 The Executive Board may terminate any designation for just cause. Nonpayment of designation or membership dues for a period of three (3) months from the date they become due and payable shall automatically terminate the designation. Notice shall be sent advising the former designee of the termination. The notice shall contain language regarding the rights and process for reinstatement found in sections 10.9.5 and 10.9.6 of these Procedural Rules.

- 10.9.3 Upon notice to the designee that the designation has been terminated, the designee shall have thirty (30) days to appeal.

- 10.9.4 Such appeal must be in writing and must be received by the Executive Director within thirty (30) days of the date of notification of termination.

- 10.9.5 If a designation is terminated for nonpayment of designation or membership dues and all outstanding dues are paid in full within one (1) year of termination of the designation, reinstatement may be approved administratively. After one year of non-payment, a designation reinstatement request must be made in writing to the Executive Director and shall be referred to the Professional Designations Subcommittee. The

Professional Designations Subcommittee shall review such request and recommend a course of action to the Executive Board.

10.9.6 Any individual whose designation has been terminated retains the right to submit a designation reinstatement request in writing at any time to the Executive Director to be referred to the Professional Designations Subcommittee. The Professional Designations Subcommittee shall review such request and recommend a course of action to the Executive Board.

10.10 RESOURCES FOR THE CANDIDATE

10.10.1 Professional Designation Advisors

Professional Designation Advisors (PDAs) are professional designees who have volunteered to share their expertise and knowledge of the program with candidates. New candidates are assigned to a PDA, either by geography or specialty. The Professional Designations Subcommittee keeps in close contact with the advisors.

10.10.2 Candidates Clubs

Many states and provinces (and some cities or counties) have active clubs of candidates who are working together for a common goal. The clubs render assistance, support, and encouragement. IAAO headquarters maintains a list of clubs. Grants may be available to help start or develop candidates clubs. A three- (3-) member subcommittee of the Professional Designations Subcommittee reviews applications.

10.10.3 Jeff Hunt, CAE, Memorial Candidates Assistance Trust

- (a) This trust was established to assist those candidates who have a financial need in preparing reports or in meeting educational requirements.
- (b) All grants must be requested on the proper application.

10.10.4 Virginia Cup

The Professional Designations Subcommittee awards the Virginia Cup each year to the state or province that has the most new designees from July 1 through June 30.

10.10.5 Promotion

Professional Designations Subcommittee members and the staff liaison should promote the program by speaking at candidates club meetings or other events.

10.10.6 PDA Meetings

PDA and candidates club leaders will have an unfunded meeting annually at the IAAO Annual Conference.

10.10.7 Verne W. Pottorff Award

The Professional Designations Subcommittee annually presents the Verne W. Pottorff Outstanding Professional Designee Award to the designee who is most effective in promoting the Professional Designation Program.

10.10.8 PDP News

IAAO produces PDP News, which is sent to all candidates and designees on an occasional basis.

10.11 RECERTIFICATION REQUIREMENTS AND PROCEDURES

10.11.1 Statement of Purpose

10.11.1.1 This program ensures that the professional designee will always have an avenue of continuing education that will keep abreast of the changes and advancements being experienced by the profession. The objective of the program is to encourage and require continued professional advancement, ensuring continued exposure to new developments in the field, thereby further guaranteeing the designee meets and continues to meet all educational requirements of IAAO and/or The Appraisal Foundation.

10.11.1.2 The program requires the designees to meet specific requirements for recertification. Obtaining recertification credit is based on the designee successfully completing structured educational programs developed specifically for real estate/personal property appraisal, cadastral mapping, property assessment administration, and related topics. Recertification credit may also be obtained for instructing structured educational courses on appraising, assessing, mapping, and/or related educational courses; having original articles published in assessment/appraisal journals; or participating in other activities approved by IAAO.

10.11.1.3 The Recertification Program is administered by the Professional Designations Subcommittee, which has the full authority and responsibility for overseeing that designees fully comply with each aspect of the IAAO Professional Designation Program and these Procedural Rules.

10.11.2 Program Requirements

10.11.2.1 Recertification requirements apply to all IAAO professional designees. The official recertification date shall be December 31 of the last year in each recertification cycle. Recertification cycles begin the January 1 immediately following the date the designation is conferred and extended for five (5) consecutive years.

10.11.2.2 Recertification cycles beginning on or after January 1, 2009, and in five (5) year cycles thereafter, require the designee with one or more designations to receive a minimum of seventy (70) tested or untested credit hours for professional designation recertification. Inclusive with the above (70) credit hours are those hours required within sections 10.11.3, 10.11.4, and 10.11.5 of these Procedural Rules.

10.11.2.3 Designees meeting recertification requirements will be certified at the end of their five- (5-) year recertification cycle by the Professional Designations Subcommittee for designation recertification. No application for recertification is required; however, an application as referenced in section 10.11.6.2 of these Procedural Rules is required in applying for and receiving recertification credit. Designees may not be recertified earlier than the end of their recertification cycle regardless of the number of credit hours accumulated during any portion of the cycle. Recertification credit accumulated in one (1) five- (5-) year cycle shall not be applied toward satisfying the requirement for a previous or subsequent recertification cycle. Education programs for which recertification credit is sought must be successfully completed within the recertification

cycle in which the credit is to be applicable, except as may otherwise be permitted by these rules. Likewise, published articles for which recertification credit is sought must have been originally published within the recertification cycle in which the credit is to be applicable.

10.11.3 Qualifying Educational Programs

10.11.3.1 Education programs that are acceptable for recertification credit are local, state, provincial, national, or international assessor or appraisal sponsored courses, seminars, workshops, or symposia or any university or college course on subjects related to appraising, assessing, cadastral mapping, or assessment administration. Specifically excluded are organizational business meetings, committee meetings, or social functions and attendance at annual conferences other than specific workshops or seminar sessions at such conferences. The maximum number of recertification credit hours that can be granted for one (1) program is forty-five (45); the minimum is one (1).

10.11.3.2 University or college courses considered to be related to appraisal and assessment administration include, but are not necessarily limited to accounting, building and construction, business law, data processing, drafting, finance, management, mathematics, public administration, real estate law, statistics, surveying, or geographical information systems (GIS). All university/college courses may be considered by the Professional Designations Subcommittee on a case-by-case basis and require the applicant to submit a listing of course materials and a course outline for approval or disapproval and the assignment of recertification credit hours.

10.11.3.3 IAAO administration will review submitted coursework for hours and applicability towards recertification as outlined in Procedural Rules 10.11.3.1 and 10.11.3.2.

January 18, 2014 Revised section 10.11.3.3 to reflect current practice and removed section 10.11.3.4.

10.11.4 Mandatory Educational Requirements

- (a) It is mandatory for resident designees of the United States, except CMS, to complete successfully, within each recertification cycle ending on or after December 31, 2009, at least 14 hours of education courses or seminars on the Uniform Standards of Professional Appraisal Practice. Approved courses or seminars for this requirement are IAAO Workshop 191, and any Appraisal Foundation-approved seven-hour national USPAP update.
- (b) Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.

July 13, 2013 Added language to exempt members outside the United States from this section.

January 18, 2014 Added alpha (a) and (b) and language specifying requirements for U.S. residents and non-U.S. residents.

10.11.4.1 It is mandatory for each designee, except CMS, to attend, within each recertification cycle ending on or after December 31, 2009, to complete successfully IAAO Workshop 171 Standards of Professional Practice as either the in-class workshop or online supplement.

10.11.4.2 It is mandatory for each CMS designee to attend, within each recertification cycle ending on or after December 31, 2002, either the four-(4-) hour IAAO online Standards of Professional Practice and Ethics, the seven-(7-) hour IAAO Workshop 171 Standards of Professional Practice and Ethics or the IAAO one- (1-) day forum on Standard 6.

10.11.5 Qualifying Instructional Activities

10.11.5.1 IAAO approved instructors may claim credit for teaching IAAO courses and workshops up to ½ of the recertification hours required. Credit for instructing any given course, workshop, or seminar, can only be awarded once during the continuing education cycle.

10.11.6 Qualifying Published Articles

10.11.6.1 In order to encourage designees to contribute to the body of assessment, mapping, and appraisal knowledge, recertification credit will be granted for the writing of original articles published in assessment/appraisal journals. Such articles must contribute to assessment administration, cadastral mapping, or appraisal knowledge and be published for state, provincial, national, or international interest. Articles submitted for this credit will be individually evaluated by the Professional Designations Subcommittee. A designee may receive credit for several articles per recertification cycle, up to a maximum of fifteen (15) credit hours within any recertification cycle. A minimum of three (3) credit hours will be granted for each article awarded recertification credit. Additional credit hours may be granted upon approval by the Professional Development Committee.

10.11.6.2 An article that has been co-authored will receive proportional credit. Short newsletter articles, press releases, and job-related instruction manuals are specifically excluded from consideration.

10.11.7 Gaining Credit

10.11.7.1 Requests for recertification credit will be processed during January and February of each year. Requests received after March 1 will be processed the following January, except during an extension period. Requests for recertification credit during an extension period will be processed immediately upon receipt, and the Professional Designations Subcommittee will render a decision within thirty (30) days thereof.

10.11.7.2 For educational program attendance, the Uniform Request for Recertification Credit Form as approved by the Executive Board must be submitted to the Professional Designations Subcommittee when a designee is applying for recertification credit and recording all program completions. The form must be completed in its entirety by the applicant and must include the signature of the course instructor or representative of the sponsoring organization. The form must be signed by the designee at the conclusion of the program and submitted to IAAO headquarters. No recertification credit will be granted to a designee for a program without application being made on this form. An application form must be submitted to record the designee's intent to have the program recorded for recertification credit. In order to evaluate properly non-IAAO programs for which recertification credit is requested, the applicant must comply with all the requirements set forth in these rules.

- (a) All Uniform Request for Recertification Credit Forms submitted will be reviewed by the Professional Development Department staff, and those meeting routine requirements as established by the Professional Designations Subcommittee will be approved. Forms containing unique or unusual requests shall be forwarded by staff to the Professional Designations Subcommittee for disposition. The applicant will be notified of the number of recertification credit hours approved.
- (b) Forms improperly filled in and incomplete forms, including those lacking proper documentation or signatures, will be returned by staff to the applicant for proper information, documentation, and/or signature.
- (c) Please note that several organizations use the Uniform Request for Recertification Credit Form, and each organization requires an individual form to be filed for credit consideration.
- (d) In requesting recertification credit for a published article, the designee must send a letter to the Professional Designations Subcommittee along with a properly executed Uniform Request for Recertification Credit Form. The letter of request should contain the full title of the article, the full name, volume number, and date of issue of the publication in which the article appeared, and the number of hours spent researching and writing the article. The designee should also enclose four copies of the contents page of the publication, which must identify the article, and four copies of the published version of the article. The Professional Designations Subcommittee will review submitted articles and determine appropriate credit. All decisions of the Professional Designations Subcommittee are final.

10.11.8 Recordkeeping

The designee is responsible for maintaining his or her individual record of recertification credit confirmations. IAAO will issue a report to each designee concerning his or her progress in meeting recertification requirements once each year.

10.11.9 Recertification Cycle Extensions

With a written request of the designee being approved by the Professional Designations Subcommittee, a recertification cycle may be extended for a period of one (1) year. Recertification credit earned during this one- (1-) year extension period will apply only in satisfying the requirement of the recertification cycle for which the extension was granted and not the requirements of any subsequent cycle; moreover, notwithstanding the extension, the subsequent cycle will end five (5) years from the cancellation date of the previous recertification cycle, not including any extension. All Procedural Rules affecting recertification shall also be applicable to extension periods. Written request for recertification cycle extension must be received by the Professional Designations Subcommittee at least thirty (30) days prior to the designee's official recertification date as identified in section 10.11.2 of these Procedural Rules. All extension periods will end when the necessary recertification requirements are completed and approved by the Professional Designations Subcommittee or on December 31 following the end of the designee's recertification cycle (whichever comes first) or, in extenuating circumstances, a date to be fixed by the Professional Designations Subcommittee.

10.11.10 Exemption

10.11.10.1 Upon approval of the Professional Designations Subcommittee, designees no longer using the designation as a credential in assessment or appraisal work shall be exempt from mandatory recertification and do not have to pay designation dues.

10.11.10.2 Request for exemption from recertification for other than retired designees will be reviewed by the Professional Designations Subcommittee and, in extenuating circumstances, the Professional Designations Subcommittee may approve an exemption.

10.11.11 Change in Cycles

10.11.11.1 Attainment of the CAE designation by an RES designee will initiate a new five- (5-) year recertification cycle, which will begin January 1 immediately following the date the CAE designation was conferred. Previously earned credits cannot be transferred to the new cycle.

10.11.11.2 Professional designate members whose IAAO membership is canceled for any reason will automatically lose their designation simultaneously with membership cancellation, and in accordance with the agreement signed when the designation was conferred, all use of the designation, pins, certificates, logos, membership card, etc. shall cease immediately. IAAO reserves the right to require, at the individual's cost, the return of all such paraphernalia.

10.11.11.3 If membership in IAAO is reestablished within one (1) year of cancellation, designation reinstatement may be permitted. A designation reinstatement request must be in writing, and the Professional Designations Subcommittee will review such request and recommend a course of action to the Executive Board. With Executive Board approval of reinstatement, the reinstated designee will enter a recertification cycle, which cycle will be the same as when the designee was dropped from membership. Such reinstatement may require the designee to be granted an extension of one (1) year. However, all requirements for designee recertification shall have been complied with on or before the end of the one- (1-) year extension period.

10.11.11.4 If membership and or designation reinstatement is not requested within one (1) year of cancellation or the request is disapproved, and the person subsequently becomes a member, such a member shall be required to enter the Professional Designation Program in the same manner and conditions as any other new member.

10.11.11.5 The application for reinstatement into the designation program requires a \$25 application fee and \$125 processing fee. These fees may be amended by the Executive Board at any time.

10.11.11.6 Application and processing fees shall be applicable to all reinstatement applications and are nonrefundable. The application fee covers a period from the date of application to December 31 following the date of application or such other date as may be fixed by the Professional Designations Subcommittee. However, under no circumstances shall an extension period exceed one (1) year, this one- (1-) year extension being from the date of application for reinstatement.

10.11.12 Failure to Meet Recertification

10.11.12.1 General Provisions

Professional designees who are not exempt from recertification in accordance with these rules and who have not received approval for the required number of recertification credit hours by December 31 of the year in which his or her recertification cycle ends will be certified to the Executive Board by the Professional Designations Subcommittee with a recommendation that the Executive Board rescind any and all such designations heretofore approved for such person. Upon Executive Board action, such designations shall be rescinded and the name of all such persons shall be removed from the Association's list of professional designees. All such persons shall be prohibited from using and or claiming any rights and privileges accruing to IAAO professional designations. Further, and in accordance with the agreement signed when the designation was conferred, all use of the designation, pin, certificate, logo, membership card, etc. shall cease immediately, and IAAO reserves the right to require, at the individual's cost, the return of all such paraphernalia.

10.11.12.2 Specific Action

Specific action will be taken by the Association to ensure that the public and the profession are made aware of those persons or members who have had their professional designation rescinded by the Executive Board.

- (a) The Association will publish the names, addresses, and place of employment of all persons who have not met recertification requirements or have had professional designations rescinded. Those who voluntarily relinquish such designation while in good standing of IAAO are to be excluded from such list. These lists will be published in an IAAO publication. All such publishing will be accomplished as soon as practical after the beginning of each calendar year.
- (b) Persons whose professional designations have been rescinded by the Executive Board or who have voluntarily relinquished such designation while in good standing shall cease and desist in making any and all use of the designation as set forth in section 10.11.10.2 of these Procedural Rules.

10.11.12.3 Violation Enforcement

Instances in which violation involving sections 10.11.11.1 and 10.11.11.2 (b) of these Procedural Rules are alleged will be investigated by the Ethics Committee as a possible violation of the IAAO Code of Ethics and Standards of Professional Conduct. All investigations will be conducted in accordance with section 3 of these Procedural Rules. Investigations can be initiated by any person who, in the opinion of the Ethics Committee, demonstrates, in writing, a supportable cause.

10.11.12.4 Right of Appeal

Any person whose professional designation is rescinded may appeal such to the Executive Board. Such appeal must be in writing and must be received by the Executive Director within thirty (30) days of the date of the letter from the Professional Designations Subcommittee or the Executive Board announcing such status.

11 SECTION 11. COMMITTEES

11.1 COMMITTEE OPERATIONS

Committees may act only within the scope of their authority as provided by the Bylaws, Procedural Rules, or the Executive Board and within the provisions of the Strategic Plan and budget.

11.1.1 Meeting Place

All standing and special committees shall meet in the city in which the Association has its headquarters, unless, upon approval of the President, there is clear evidence that a meeting can be held less expensively in another location, or if an Ethics Hearing is to be held elsewhere in accordance with section 3.6.1.7 (a) or 3.6.1.8 (e) of these Procedural Rules. The Executive Director shall arrange the required meeting area as requested by the chair of the committee.

11.1.1.1 The chair shall arrange the meeting time through the Executive Director to accommodate the availability of staff and to minimize airfare costs.

11.1.1.2 A sufficiently detailed written agenda shall be prepared by the committee for each meeting and, if possible, sent to committee members ten (10) days prior to the scheduled meeting date with copies sent to IAAO headquarters.

11.1.1.3 When possible, the date, time, and location of committee meetings shall be published in advance in an IAAO publication.

11.1.2 Number of Meetings

The President shall annually determine the number of meetings, in accordance with the annual budget and Strategic Plan as approved by the Executive Board, required for each standing committee and special committee. In determining the number of meetings, the President shall consider the following:

- (a) the work assigned by the Executive Board to the committee
- (b) the current projects assigned to the committee
- (c) the projects that are ongoing and not completed from the prior year
- (d) the amount budgeted for committee meetings.

11.1.3 Reports of the Committees

11.1.3.1 The chair of each standing or special committee shall report in writing to the Executive Board. Such written report shall be delivered to the Executive Director not less than twenty-one (21) days prior to the Executive Board meeting for which the committee is scheduled to report.

11.1.3.2 The report shall include actions and/or motions that the committee requests the Executive Board to consider or take action on.

11.1.3.3 All minutes of standing committees shall be delivered to the Executive Director not more than thirty (30) days after the meeting, on the standard committee minutes form.

11.1.4 Work Methods

11.1.4.1 The chair shall assign work, projects, and/or reports to members of the committee. Such assignments shall be completed between meetings, with the members reporting to the chair prior to the next committee meeting.

11.1.4.2 Whenever a committee believes that a project would benefit from the involvement/expertise of members outside the committee, it may solicit volunteers to participate in such projects subject to the committee budget.

11.1.4.3 The committee members are encouraged to communicate between meetings. This communication will allow members to review and comment on reports and other written documentation prior to the committee meeting.

11.1.4.4 All committee files and papers, in general, shall be maintained at the Association headquarters. At the end of the chair's term, all committee materials in his or her possession must be turned over to the Association headquarters, to ensure availability for future committees.

11.1.4.5 Copies of correspondence to persons outside of the committee members concerning committee activities shall be forwarded to the Association headquarters.

11.1.5 Staff Support

Committees are responsible for most of the work on a project, with staff providing designated assistance only as assigned by the Executive Board and the Executive Director. The Executive Director shall assign IAAO staff members, as needed, to standing and special committees. The chair shall make a written request for staff assistance to the Executive Director. Included in the written request shall be an estimate of the amount and nature of project work, estimate of personnel time required, and any other nonpersonnel resource required.

11.1.6 Voting Rules

All committee votes shall be in accordance with section 11.3 of the Association Bylaws.

11.1.6.1 A vote may be taken by any committee by a telephone vote by conference telephone arrangements allowing all participants to communicate with each other, conducted by the applicable committee chair.

11.1.6.2 A majority vote of the members present is needed to approve any motion voted on by the committee. In the case of a tie vote, the motion will be considered defeated.

11.1.7 Quorum

11.1.7.1 A quorum for any committee shall be a majority (51 percent or more) of the members of the committee.

11.1.7.2 Notwithstanding the provisions of section 11.1.7.1 of these Procedural Rules, the lack of a quorum shall not prohibit a committee from holding a properly scheduled meeting and making recommendations to the Executive Board for consideration and action, so long as the lack of a quorum is duly noted by the committee.

11.2 COMMITTEE TERMS

11.2.1 General Provisions

All terms of committee members shall begin at the same time as the term of the appointing authority and shall end at the same time as the President's term expires in the same year as their term ends, except for members of the Conference Content Committee and the Local Host Committee, whose terms shall begin on the day following the annual conference and shall end at the close of the annual conference in the year their term ends. An IAAO member can serve on only one (1) standing committee.

11.2.1.1 In the event of a vacancy, the President may appoint a member to serve the balance of the term of the position vacated.

11.2.1.2 In the event a committee member changes membership category during his or her term, the member may serve the remainder of the year.

11.2.2 Standing Committee Terms

11.2.2.1 One of the members of a standing committee shall be designated as the chair of the committee by the President except the Budget Committee and the Audit Committee. The member designated shall serve as chair for a one- (1-) year period. In order to be eligible for appointment as committee chair, a candidate must have successfully

January 17, 2014 Added the Budget and Audit Committees as exceptions.

- (a) completed IAAO Workshop 171 Standards of Professional Practice and Ethics
- (b) demonstrated extensive competence in the committee's area of responsibility.

April 5, 2013 Removed the phrase '(commencing with the 2008 appointments)' from 11.2.2.1 (a).

A candidate must further furnish documentation that he or she complies with at least three (3) of the following:

- (a) holds an active IAAO designation
- (b) has been a member of IAAO for at least five (5) years
- (c) has completed at least three (3) IAAO courses
- (d) has served on an IAAO committee
- (e) has served as an IAAO Representative
- (f) holds a state or provincial designation/certification
- (g) has attended at least two (2) IAAO Annual Conferences
- (h) is an IAAO accredited member
- (i) has authored an article in an IAAO publication within the past five (5) years
- (j) has served as an officer in a local chapter of IAAO
- (k) has served as an officer in an affiliated state or provincial assessor association
- (l) has served as an IAAO Instructor
- (m) has served as a Designation Grader
- (n) has served as a Professional Designation Advisor.

11.2.2.2 A member of a standing committee shall be appointed to a three- (3-) year term, with the exception of the Audit Committee as defined in section 11.3.13 of these Procedural Rules and the Local Host Committee Representative on the Conference Content

Committee as described in section 11.2.14. The three- (3-) year terms of members on standing committees shall expire in staggered years. Committees with six (6) members shall have two (2) terms expiring each year, except in the case of the Budget Committee in which the chair is appointed to the committee for a one- (1-) year term and the Executive Board member is appointed for a one- (1-) year term. The remaining three (3) members, other than the Vice President, shall have one (1) term expiring each year. The Professional Development Committee shall consist of four (4) subcommittees having six (6) members each. One of the six (6) subcommittee members shall serve as chair of that subcommittee. Each subcommittee shall have two (2) terms expiring each year. The chair of the Professional Development Committee and the chairs of the subcommittees shall be appointed for one- (1-) year terms. The Membership Services Committee shall consist of six (6) members, with two (2) terms expiring each year and one (1) additional member serving as the chair, who shall be appointed for a one- (1-) year term.

October 18, 2014 changing: three to "four" subcommittees

11.2.2.3 A committee member may only serve two (2) consecutive terms in a given position. A committee chair may only serve two (2) consecutive terms as chair of the same committee. Nonconsecutive terms of service on committees or as committee chairs are not prohibited by this provision.

11.2.2.4 The President may appoint regular or associate members to any of the positions listed above, subject to the number of regular or associate members included within the committee structure.

11.2.2.5 The committee chair shall notify any committee member who has been absent from two consecutive in-person committee meetings that he or she is removed as a member of that committee and the position is considered vacant. The committee chair shall notify the President of such action. Any committee member who wishes to appeal his or her removal must provide written explanation for his or her absences to the Executive Board within thirty (30) days of notification. The Executive Board may waive removal if special circumstances so warrant.

April 5, 2013 Added 'in person' to the first sentence.

11.2.3 Special Committees Terms

The chair and members of all special committees shall serve a one- (1-) year term.

April 26, 2014 Removed section 11.2.4, regarding councils and sections.

11.3 STANDING COMMITTEES

11.3.1 Budget Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by preparing, coordinating, and maintaining the annual budget of the Association. The committee should ensure that the annual budget is in concert with the Strategic Plan and in harmony with the mission, commitments, vision, and current financial position of the Association. This committee, in cooperation with the Executive Director and the President, should estimate

revenues and expenses for the upcoming fiscal year. The committee should offer goals and objectives to ensure fiscal solvency to the Executive Board.

(b) Budgeting

This committee should ensure that the IAAO budget is balanced and that the organization is operating according to sound fiscal policy. The committee should work closely with committee chairs, the Executive Director, and the Executive Board to construct an annual budget based on the Strategic Plan as prioritized by the Executive Board. The committee should report, on a regular basis, the financial condition of the Association to the Executive Board, recommending goals and objectives to ensure both solvency and financial strength.

(c) Responsibilities

- (1) Annually coordinate the preparation of the IAAO operating budget.
- (2) Integrate the budget with the Strategic Plan.
- (3) Deliver a final budget with a comprehensive activity plan to the Executive Board for adoption no later than the annual conference.
- (4) Annually report to the Executive Board the status of planning, budget, and management efforts.

(d) Members

Six (6) members to include the following:

- President-Elect appointed as committee chair
- Vice-President
- one (1) non-officer Executive Board member (one- [1-] year term)
- two (2) regular members
- one (1) associate member.

(e) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(f) Products

IAAO Annual Budget

11.3.2 Planning and Rules Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by preparing the Strategic Plan and coordinating project plans as directed by the Executive Board. It also reviews and coordinates project plans from other committees and staff, and develops projects from the Strategic Plan. These project plans should be in harmony with the Strategic Plan, the budget, and other resources of the Association. Project planning is essential to the long-term success of the organization and implies the effective use of resources. The committee should encourage effective leadership through the integration of planning, management, and

quality improvement. The committee works with staff to develop the orientation of Association leaders. The committee should maintain the Leadership Model to ensure the effective integration of planning with management and continuous improvement. The committee and staff, in cooperation with the Executive Board, should annually prepare the agenda, arrange for speakers, and coordinate the orientation of Association leaders. To ensure that appropriate alternative goals and objectives are available to the Executive Board, the committee should periodically review economic, social, governmental, and technical trends that may affect the profession. The committee should continually survey the quality of IAAO goods and services, the needs of members, the strengths and weaknesses of the organization, and the threats and opportunities facing the organization. The committee should report those findings to the Executive Board. The committee should maintain the Constitution, the Bylaws, and Procedural Rules of the Association. As stewards of these documents, this committee is responsible for ensuring that all actions by committees and the Executive Board are in harmony with the Constitution, maintaining, updating, and reviewing the Bylaws and all other Procedural Rules of the Association.

(b) Responsibilities

This committee is responsible for the Strategic Plan of the Association and for creating and coordinating project plans for action by the Executive Board. In addition to these individual assignments, this committee should annually

- (1) initiate discussions about mission, philosophy, values, and vision to ensure a common understanding by Association leaders
- (2) evaluate the need to scan the environment to understand member needs so that Association goods and services can be higher quality and timely and genuinely serve the needs of members
- (3) update the goals and objectives in the Strategic Plan and present these goals and objectives to the Association leaders
- (4) compile and maintain quality improvement guidelines explaining how to achieve the highest level of quality in the Association's goods and services
- (5) present ideas and topics for seminars and the annual conference
- (6) promote the management philosophy of IAAO to incoming leaders through an annual orientation meeting
- (7) review and update the following administrative modules:
 - a. Strategic Plan
 - b. status of ongoing projects
 - c. leadership model and working procedures
 - d. annual activity schedule
 - e. quality improvement guidelines.
- (8) review and update the following organizational documents:
 - a. Constitution
 - b. Bylaws
 - c. Procedural Rules
 - d. policy Statements
 - e. position statements
 - f. committee structure and appointment grid.
- (9) report to the Executive Board on these activities.

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed committee chair)
- one (1) associate member.

(d) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(e) Products

- (1) committee appointment grid
- (2) project plans
- (3) IAAO annual activity schedule
- (4) IAAO Strategic Plan
- (5) status of ongoing projects
- (6) leadership model and working procedures
- (7) quality improvement guidelines
- (8) Constitution
- (9) Bylaws
- (10) Procedural Rules.

11.3.3 Professional Development Committee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by addressing the educational and professional designation needs of Association members and instructors and annually award the IAAO Lifetime Achievement Award. The committee consists of three subcommittees that deal primarily with three areas of concern: education, professional designations, and instructors.

July 18, 2014 Added IAAO Lifetime Achievement Award.

(b) Chair Responsibilities

The chair of this committee is responsible for leading, coordinating, and integrating the efforts of this committee, as well as representing the committee to the Executive Board. The committee chair should be available during meetings of the subcommittees as counsel to facilitate decision-making, and guide the subcommittee activities. No member of the committee shall be eligible to receive any award conferred by the committee during their term.

April 26, 2014 Added provision regarding not receiving awards conferred by the committee while serving on the committee.

July 18, 2014 Redefined the role of the committee chair in relationship to the subcommittees.

(c) Members

Members shall consist of the chair and the members of the subcommittees. The chair and chairs of each of the subcommittees shall constitute a steering committee for the full committee and may at the discretion of the chair meet as the steering committee.

July 18, 2014 Defined the committee membership and established a steering committee for the full committee.

(d) Reporting Contact

The committee chair reports to the Executive Board.

(e) Products

- (1) list of IAAO education courses and curriculum
- (2) list of instructors annual summary report
- (3) student registration records
- (4) designation requirements
- (5) recertification procedures
- (6) guides to demonstration reports
- (7) accreditation guidelines
- (8) list of designation program participants
- (9) list of professional designation advisors
- (10) list of local designation candidates clubs
- (11) Annual Professional Seminar, if held.
- (12) Lifetime Achievement Award(s)

(f) Lifetime Achievement Award

This award recognizes an IAAO member who has dedicated themselves to the organization and its members through education, instruction and the Professional Designation Program. The committee may grant up to three (3) awards annually to qualified individuals. Nominations may come from the membership at large as well as the committee and each of the subcommittees. Qualified individuals will have spent a significant portion of their career in the assessment administration, appraisal or property tax fields and distinguished themselves as a recognized leader in the area of professional development at the local, national or international level. Nominees shall have been members of IAAO for 25 or more years and served IAAO for 15 years or more through committee work in the professional development areas, as an instructor, as a course coordinator, as a curriculum developer or reviewer, a demonstration appraisal grader or a professional designation advisor.

July 18, 2014 Added items (e) (12) and (f) for the IAAO Lifetime Achievement Award.

11.3.3.1 Education Subcommittee

(a) Purpose

The purpose in the education area is to support the mission and commitments of IAAO by developing, coordinating, maintaining, and guiding the educational program of IAAO. This program is the foundation of professionalism, as it provides the knowledge that is required in property valuation for property tax purposes, property tax administration, and property tax policy. The efforts of this subcommittee are fundamental to quality assessment practice, which serves the public good.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, the subcommittee should annually

- (1) review the IAAO curriculum to ensure that it conforms to the mission and commitments of the Association

- (2) ensure that the education program and the accreditation program provide a coordinated effort to certify assessment professionals
- (3) ensure that the education program reflects the latest assessment standards, standards of professional practice, and ethics provisions
- (4) plan, develop, and monitor IAAO textbooks and other educational publications
- (5) report to the Executive Board on these activities
- (6) work cooperatively with the IAAO International Committee
- (7) develop and maintain adequate curriculum
- (8) examine programs of other organizations and institutions and recommend programs for accreditation
- (9) plan, develop, implement, and monitor a distance education program
- (10) plan, develop, implement, and monitor customized, individual courses of study
- (11) seek funds to promote education
- (12) recommend new goals and objectives to provide the desired mix of services to the Planning and Rules Committee for inclusion in the Strategic Plan
- (13) cooperate with the Membership Services Committee to develop services for members
- (14) present ideas and topics for seminars and the annual conference.

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed subcommittee chair)
- one (1) associate member.

(d) Products

- (1) list of IAAO education courses and curriculum
- (2) student registration records.

11.3.3.2 Professional Designations Subcommittee

(a) Purpose

The purpose in the professional designation area is to support the mission and commitments of IAAO by defining, coordinating, and maintaining and guiding the designation and accreditation programs of IAAO. These programs recognize professionalism in property valuation for property tax purposes, property tax administration, and property tax policy and demonstrate IAAO's commitment to excellence.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, the subcommittee should annually

- (1) review the IAAO designation program to ensure it conforms with the mission and commitments of the Association
- (2) ensure that the designation program provides a coordinated effort to certify assessment professionals
- (3) ensure that the designation program reflects the latest assessment standards, Uniform Standards of Professional Appraisal Practice, and ethics provisions
- (4) work cooperatively with the educational program of IAAO
- (5) report to the Executive Board on these activities

- (6) establish and maintain a program for continuing education and periodic recertification
- (7) establish and maintain a program for accreditation with other organization and institutions
- (8) promote the professional designation program
- (9) examine programs of other organizations and institutions and recommend programs for accreditation
- (10) recommend new goals and objectives to provide the desired mix of services to the Planning and Rules Committee for inclusion in the Strategic Plan
- (11) cooperate with the Membership Services Committee to develop services for members
- (12) present ideas and topics for seminars and the annual conference
- (13) prepare a listing of Professional Designation Advisors

No member of the subcommittee shall be eligible to receive any award conferred by the subcommittee during their term.

April 26, 2014 Added provision regarding not receiving awards conferred by the subcommittee while serving on the subcommittee.

(c) Members

- Six (6) members, who must hold designations, to include the following:
- five (5) regular members (one appointed subcommittee chair)
 - one (1) associate member.

(d) Products

- (1) designation requirements
- (2) recertification procedures
- (3) guides for demonstration reports
- (4) accreditation guidelines
- (5) list of designation program participants
- (6) list of professional designation advisors

11.3.3.3 *Instructor Relations Subcommittee*

(a) Purpose

The purpose of this subcommittee is to support the mission and commitments of 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.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this subcommittee should

- (1) modify and maintain the Instructor Training Workshop (ITW) to develop and maintain an adequate cadre of instructors
- (2) establish educational and experience criteria for participants in an ITW
- (3) establish requirements and criteria for the various instructor classifications
- (4) train, coordinate, and monitor the quality of instructors
- (5) annually notify instructors of their performance

- (6) work with and maintain close liaison with state and provincial education coordinators
- (7) annually at the IAAO conference, conduct an ITW, Instructors Update Workshop, and Education Coordinators' Meeting.

No member of the subcommittee shall be eligible to receive any award conferred by the subcommittee during their term.

April 26, 2014 Added provision regarding not receiving awards conferred by the subcommittee while serving on the subcommittee.

(c) Members

Six (6) regular members (one appointed subcommittee chair) to include the following:

- three (3) either senior or specialty instructors
- three (3) education coordinators/sponsors.

(d) Products

List of instructors annual summary report.

11.3.3.4 Certificate of Excellence in Assessment Administration (CEAA) Subcommittee

(a) Purpose

The purpose of the Certificate of Excellence in Assessment Administration (CEAA) Subcommittee is to support the mission and commitments of the IAAO by defining, coordinating, maintaining, and guiding program(s) to highlight the professionalism of certified jurisdictions of the IAAO. These programs recognize professionalism in property appraisal, property tax administration, and property tax policy and demonstrate IAAO and its certified jurisdiction's commitment to excellence.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, the CEAA Subcommittee should annually

- (1) review the CEAA program to ensure it conforms with the mission and commitments of the association
- (2) ensure that the CEAA program provides a coordinated effort to certify assessment jurisdictions
- (3) ensure that the CEAA program reflects the latest assessment standards, Uniform Standards of Professional Appraisal Practice, and ethics provisions
- (4) report to the Executive Board on these activities
- (5) establish and maintain a program for periodic recertification
- (6) promote the CEAA program
- (7) recommend new goals and objectives to provide the desired mix of services to the Planning and Rules Committee for inclusion in the Strategic Plan
- (8) organize the annual Conference function, as needed
- (9) prepare and maintain a listing of Mentors and Graders

(c) Members:

The CEAA Subcommittee shall consist of six (6) members to include the following;
 Five (5) regular members (one appointed Subcommittee Chair)
 One (1) associate member

Of the five regular members, at least two members are to be from different jurisdictions that hold a CEAA Certificate.

(d) *Products:*

- (1) Certificate General Procedures
 - Initial Certificate Requirements
 - Recertification Requirements
- (2) Candidate Guides for preparation of Candidate submissions
- (3) Listing of CEAA Program Participants (Candidate, Certified, and Recertified)
- (4) Listing of Mentors and Graders
- (5) Annual Conference Function, as needed
- (6) CEAA Plaque
- (7) Candidate & recertification materials
- (8) Marketing materials & logo
- (9) Mentor & Grader guides
- (10) Grading Matrix
- (11) Other materials, documents, and guides as needed

11.3.4 Research Subcommittee

(a) *Purpose*

The purpose of this committee is to support the mission and commitments of IAAO by addressing the research needs of IAAO members and engaging in research as prioritized and assigned by the IAAO Executive Board. The committee should focus on research in property valuation, property tax administration, and property tax policy; should identify current problematic and anticipated issues needing research; and should work cooperatively with the other committees and IAAO groups to identify research issues. This committee should maintain an active list of researchers.

April 26, 2014 Removed reference to councils and added "IAAO groups".

(b) *Responsibilities*

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) review the research objectives in the Strategic Plan to ensure they serve the assessment profession
- (2) recommend new goals and objectives to the Planning and Rules Committee for inclusion in the Strategic Plan
- (3) report to the Executive Board on these activities
- (4) deliver research findings to the Communications Committee for dissemination
- (5) perform a clearinghouse role for the accumulation and dissemination of data
- (6) provide input into conferences, seminars, and workshops on current problematic and anticipated issues
- (7) conceptualize and respond in a timely manner on research projects that capitalize on immediate opportunities
- (8) correspond with IAAO Representatives on matters of research, such as data collection
- (9) cooperate with the Membership Services Committee to develop services for members

- (10) present ideas and topics for seminars and the annual conference
- (11) manage the Academic Partnership Program, including oversight of the grant process and dissemination of the research findings
- (12) manage and administer the Certificate of Excellence in Assessment Administration (CEAA).

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed committee chair)
- one (1) associate member.

(d) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(e) Products

Historic list of research projects by the following subjects:

- (1) property valuation
- (2) property tax administration
- (3) property tax policy inquiry answering service
- (4) research monographs
- (5) a listing of researchers
- (6) taxonomies
- (7) report to the Executive Board on these activities.

11.3.5 Technical Standards Committee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by conceptualizing, organizing, drafting, publishing, and maintaining technical standards of professional practice. These standards should address property valuation, property tax administration, and property tax policy and should describe desirable models for the profession.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) write new standards that conform to the mission and goals of the Association
- (2) review and revise the current standards to ensure they conform to the IAAO mission and goals and best practices.
- (3) ensure that all committees and IAAO groups are aware of the anticipated changes to standards
- (4) perform periodic ratio study surveys to gauge conformance with current standards, determine current practices and emerging issues, and keep the Standard on Ratio Studies relevant
- (5) ensure that membership has been exposed to proposed new or revised standards prior to approval by the Executive Board

- (6) recommend new goals and objectives to provide the desired mix of services to the Planning and Rules Committee for inclusion in the Strategic Plan
- (7) cooperate with the Membership Services Committee to develop services for members
- (8) present ideas and topics for seminars and the annual conference
- (9) review and recommend glossary terms for inclusion in technical standards and the *IAAO Glossary*.

April 26, 2014 In (b) (3) removed reference to councils and added "IAAO groups".

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed committee chair)
- one (1) associate member.

(d) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(e) Products

- (1) technical standards
- (2) ratio practices survey
- (3) *IAAO Glossary*

11.3.6 Membership Recognition Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by annually soliciting, reviewing, and selecting the winners of IAAO awards, except for awards selected by other committees or those based on pre-set criteria, recognizing leadership, and acknowledging outstanding performance in property tax valuation, property tax administration, and property tax policy. The committee should also ensure that people and organizations who deserve special recognition receive this recognition by resolution of the Association. This committee should focus its efforts through projects assigned by the IAAO Executive Board.

(b) Responsibilities

In addition to selecting award winners and completing special projects assigned by the Executive Board, the committee should annually

- (1) select members who have earned recognition through their efforts and who have been nominated for awards
 - a. no member of the committee shall be eligible to receive any award conferred by the committee during their term
 - b. a committee member whose jurisdiction has been nominated for an award is prohibited from discussion and subsequent voting for said award.

January 17, 2014 Added conflict of interest provisions a. and b. to 11.3.6 (b) (1).

- (2) review all awards currently in place to determine whether they represent a balanced representation of the roles of IAAO
- (3) review all goals and objectives in the Strategic Plan to ensure that the goals and objectives provide quality services to all IAAO members
- (4) review membership-related goals and objectives in the Strategic Plan to ensure that the goals and objectives provide increased award opportunities for IAAO members
- (5) recommend new goals and objectives to provide the desired mix of services to the Planning and Rules Committee for inclusion in the Strategic Plan
- (6) report to the Executive Board on these activities
- (7) present ideas and topics for seminars and the annual conference
- (8) recommend the naming of awards that memorialize individuals only after an individual has been deceased for more than five (5) years
- (9) prepare all necessary resolutions
- (10) enlist assistance of IAAO in recognizing outside achievements compatible with the mission and vision of IAAO that may be eligible for awards
- (11) actively market and seek award nominees for all award categories.

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed committee chair)
- one (1) associate member.

(d) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(e) Products

- (1) historic list of awards
- (2) annual brochure for the solicitation of award nominations
- (3) deceased member resolution
- (4) annual conference local host gratitude resolution
- (5) annual conference worker resolution
- (6) annual conference speaker resolution
- (7) annual conference exhibitors resolution
- (8) officer commendation resolution
- (9) graders appreciation resolution
- (10) professional designation advisors resolution
- (11) contributors to the Educational Development Campaign resolution.

11.3.7 Membership Services Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by representing members through IAAO Representatives. This committee should provide outreach

to current members to ensure that their needs are recognized by IAAO leadership. The committee should explore opportunities to further serve the membership and support all recruitment and retention activities of the organization. The committee should focus on projects assigned by the Executive Board. This would include raising the Association's profile and ensuring that others know members' capabilities, as well as identifying and targeting market groups and audiences, such as chapters, affiliates, countries, and individuals.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) respond to requests for advice
- (2) document and present the needs of the general membership to the Executive Board
- (3) identify sources of funding
- (4) identify resources to promote outreach
- (5) report to the Executive Board on activities
- (6) recommend new goals and objectives to the Planning and Rules Committee for inclusion in the Strategic Plan
- (7) identify and disseminate information to members
- (8) recruit and retain members for the Association
- (9) prepare a report card of the performance of IAAO for the previous year with recommendations for improvement
- (10) cooperate with the Awards Committee to develop services for members
- (11) present ideas and topics for seminars and the annual conference.

(c) Members

Seven (7) regular members to include a current IAAO Representative to serve as chair and six (6) others selected from among current IAAO Representatives, two (2) each being from the three (3) general geographic regions defined in section 8.1.2.9 and shown in Appendix A of these Procedural Rules.

(d) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(e) Products

- (1) list of members recruited
- (2) list of McCarren Award winners.

11.3.8 Ethics Committee

(a) Purpose

This committee has two (2) primary functions. First, it should support the mission and commitments of IAAO by conceptualizing, organizing, drafting, maintaining, and publishing a IAAO Code of Ethics and Standards of Professional Conduct. Second, this committee should address ethical complaints.

The IAAO Code of Ethics and the Standards of Professional Conduct should conform to The Appraisal Foundation Uniform Standards of Professional Appraisal Practice. Together, this code and these standards should describe a desirable model of ethical and professional behavior for the property tax professional.

This committee should respond to charges of ethical misconduct. It should receive, investigate, and adjudicate charges brought before the committee. It should periodically publish advisory illustrative examples defining the IAAO Code of Ethics and Standards of Professional Conduct.

(b) Responsibilities

In addition to special projects and cases assigned by the Executive Board, this committee should annually

- (1) review the IAAO Code of Ethics and Standards of Professional Conduct to ensure they conform to the mission and commitments of the Association
- (2) ensure that the Professional Development Committee is aware of anticipated changes to standards
- (3) recommend new goals and objectives to ensure high standards of professional conduct are presented to the Planning and Rules Committee for inclusion in the Strategic Plan
- (4) respond to ethical charges as presented according to section 3.6.1 of these Procedural Rules
- (5) respond to any matter as directed by the Executive Board
- (6) report to the Executive Board on these activities
- (7) cooperate with the Membership Services Committee to develop services for members
- (8) present ideas and topics for seminars and the annual conference.

November 14, 2015 added IAAO before Code of Ethics in 1st 2 paragraphs; changed Professional Standards to Standards of Professional Conduct

(c) Members

All members, including the chair of the Ethics Committee, must have successfully completed an ethics course approved for credit by the Professional Development Committee.

Six (6) members to include the following:

- five (5) regular members (one appointed as committee chair and one appointed as vice-chair)
- one (1) associate member.

Temporary members should be appointed as necessary per section 3.6.1.7 (c) of these Procedural Rules.

(d) Reporting Contact

The committee chair reports directly to the Executive Board.

(e) Products

- (1) IAAO Code of Ethics and Standards of Professional Conduct
- (2) ethics decisions on complaints

- (3) advisory rulings.

11.3.9 Associate Members Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by offering the unique perspective of the private sector. IAAO is committed to a philosophy of inclusion and recognizes the importance of understanding all perspectives toward property appraisal, assessment administration, and property tax policy.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) respond to requests for advice
- (2) identify and state the needs of the private sector
- (3) suggest and identify sources and opportunities for funding
- (4) report to the Executive Board on activities
- (5) recommend new goals and objectives to the Planning and Rules Committee for inclusion in the Strategic Plan
- (5) cooperate with the Membership Services Committee to develop services for members
- (6) present ideas and topics for seminars and the annual conference

(c) Members

Six (6) members to include the following:

- five (5) associate members (one appointed committee chair)
- one (1) regular member.

(d) Reporting Contact

The committee chair is to report directly to the Executive Board.

(e) Products

Fund-raising activities

January 17, 2013 Added reference to committee Chair in (c).

11.3.10 USPAP and Appraiser Regulatory Advisory Subcommittee

(a) Purpose

This committee has three primary functions: (1) to draft, review, and comment on *Uniform Standards of Professional Appraisal Practices (USPAP)* standards exposure drafts and other documents from the Appraisal Standards Board; (2) to provide information, draft reviews, and comments to the Appraisal Qualifications Board and to draft, review, and comment on issues to the Appraisal Practices Board; and (3) to provide information, draft reviews and comments on appraisal qualifications by state licensing agencies.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) review all *USPAP* exposure drafts and provide comments to all standards updates

- (2) provide comments to the Appraisal Standards Board about issues related to Standard 6 (mass appraisal, real and personal property)
- (3) review state licensing boards qualifications concerning mass appraisal experience.
- (4) draft model legislation for Standard 6 and qualifications
- (5) report to the Executive Board on activities
- (6) recommend new goals and objectives to the Planning and Rules Committee for inclusion in the Strategic Plan
- (7) present ideas and topics for seminars and the annual conference
- (8) provide information draft reviews and comments on any other related Appraisal Foundation issues and activities.

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed as committee chair)
- one (1) associate member
- one (1) regular member appointed as representative to The Appraisal Foundation for a one- (1-) year term (does not include The Appraisal Foundation Trustee appointed by the President)
- one (1) regular member appointed as representative to the Association of Appraiser Regulatory Officials for one- (1-) year term.

(d) Reporting Contact

Committee chair to report directly to the Executive Board.

(e) Products

- (1) interim reports to the Executive Board
- (2) responses to state licensing agencies
- (3) responses to the Appraisal Standards Board
- (4) responses to the Appraisal Qualifications Board.

11.3.11 Legal Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by offering the unique perspective of members who are primarily involved or interested in legal issues. IAAO is committed to a philosophy of inclusion and recognizes the importance of the unique perspective of legal experts. The Association acknowledges that many of its activities rely on sound legal principles that support the fundamentals of assessing. It also recognizes the importance of the legal framework for accurate property valuation, property assessment administration, and property tax policy. This committee should provide a forum for exchanging information among committee members and the general membership.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) foster, encourage, and advance legal education relating to the assessment process

- (2) identify and state the needs of the general membership as they pertain to legal issues
- (3) suggest and identify sources and opportunities of funds
- (4) report to the Executive Board on activities and assist the Executive Board when requested
- (5) recommend new goals and objectives to the Planning and Rules Committee for inclusion in the Strategic Plan
- (6) cooperate with the Membership Services Committee to develop services for members
- (7) present ideas and topics for seminars and the annual conference.

(c) Members

Six (6) members to include the following:

- five (5) attorney members, at least one being an associate member (one appointed committee chair)
- one (1) regular non-attorney member.

(d) Reporting Contact

The committee chair reports to Executive Board.

(e) Products

(Reserved)

January 17, 2014 Added reference to associate member and the word 'committee' to (c).

11.3.12 Marketing, Communications and Technology Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by (1) providing oversight and direction for IAAO periodicals and electronic publications and the IAAO Website; (2) working in conjunction with other appropriate committees in the development, maintenance, and continuity of education materials; and (3) providing recommendations for better communication between the staff, Executive Board, committees, and members.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) monitor content of publications, broadcast e-mail, and the IAAO Website
- (2) review frequency and distribution methods for newsletters, periodicals, electronic media, and other communications
- (3) solicit authors, reviewers, and participants for communication projects
- (4) work with other associations on a joint publication, if approved by Board action
- (5) review organizational needs and other methods to obtain and publish periodicals, newsletters, and other forms of communication
- (6) review and assist in Web page development, content, and use
- (7) annually review the communication process within IAAO
- (8) supervise the Editorial Review Board
- (9) oversee the development of book publications through an IAAO press

- (10) set publication standards to create and ensure a uniform professional presence for all publications and visual communications media.

(c) Members

Six (6) members to include the following:

- five (5) regular members (one appointed as committee chair)
- one associate member.

(d) Reporting Contact

The committee chair reports directly to the Executive Board.

(e) Products

Interim reports to the Executive Board.

11.3.13 Annual Conference Content Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by ensuring that the content of the Education Program at the IAAO Annual Conference provides a wide spectrum of timely and meaningful topics in the area of property appraisal, assessment administration, and property tax policy. This committee should actively solicit papers and speakers on all types of issues, as well as be responsible for the organization of these papers and speakers into the final educational program format.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) review all papers submitted to IAAO for presentation at the IAAO Annual Conference to determine their appropriateness for presentation
- (2) actively solicit papers and speakers on topics of general interest to the membership
- (3) organize all abstracts and speakers for the IAAO Annual Conference.

(c) Members

Seven (7) members to include

- five (5) regular members (one appointed chair)
- one (1) Local Host Committee Representative who shall serve a one- (1-) year term
- one (1) associate member.

(d) Reporting Contact

The committee chair is to report directly to the Executive Board.

(e) Products

Educational program for the IAAO Annual Conference.

11.3.14 Chapters and Affiliates Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by fostering strong relationships with chapters and affiliates. The committee should carry out a

program of ongoing communication with chapters and affiliates that raises the Association's profile, ensures awareness of its resources, and identifies chapters and affiliates needs and concerns.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) respond to requests for advice
- (2) document and report the needs of chapters and affiliates
- (3) identify sources of funding
- (4) report to the Executive Board on activities
- (5) recommend new goals and objectives to the Planning and Rules Committee for inclusion in the Strategic Plan
- (6) retain existing and develop new chapters and affiliates
- (7) prepare a report of the committee's activities
- (8) present ideas and topics for seminars and the annual conference
- (9) identify target market groups to market IAAO products and services.

(c) Members

Six (6) regular members from among current chapters and affiliates, two (2) each being from the three (3) geographic regions defined in section 8.1.2.9 and Appendix A in these Procedural Rules. Each region shall be represented by one (1) chapter and one (1) affiliate member. If neither a chapter member nor an affiliate member can serve, then two (2) members from the same group shall be allowed. The President shall appoint the chair annually.

(d) Reporting Contact and Chair Responsibilities

The committee chair reports to the Executive Board. The chair of this committee is responsible for leading, coordinating, and integrating the efforts of the committee, as well as representing the committee to the Executive Board. The committee chair should be present at the committee meetings to lead and guide. The committee chair should act as counsel to resolve conflicts and facilitate decision-making.

(e) Product

List of chapters and affiliates.

11.3.15 International Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by increasing global awareness of programs, education and networking opportunities.

(b) Responsibilities

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

- (1) review the International Development Plan to assure it remains consistent with the IAAO Strategic Plan and update the International Development Plan as needed; not less than every three years
- (2) coordinate and communicate with other IAAO committees to ensure that their products and services are as globally applicable as possible and encourage the

- sharing of ‘lessons learned’ by members representing non-U.S. and Canadian interests
- (3) create and foster meaningful relationships with like-minded international organizations
 - (4) position the IAAO as the international source for expertise in mass appraisal, assessment administration and property tax policy
 - (5) collaborate with the Conference Content Committee to promote and encourage an international perspective at the IAAO International Conference, through development of specific events dedicated to international themes
 - (6) provide educational opportunities geared to global audiences
 - (7) recommend strategies to encourage individual members to bring challenges to the attention of ambassadors, or other points of contact within IAAO
 - (8) recommend strategies to increase and sustain international membership to the Membership Services Committee
 - (9) promote and coordinate with the Conference Content and Local Host Committees the provision of a personal liaison to not-U.S. or Canadian attendees at annual conference
 - (10) act as a clearinghouse for international ideas, events and issues
 - (11) create and maintain an Ambassador Program that involves members in local efforts to promote IAAO and to serve as organizational representatives
 - (12) work with IAAO staff to assure that international interests and resources are well represented on the IAAO Website.

(c) Members

Individuals considered for the International Committee should be selected on the basis of their regional expertise, and not necessarily as experts in their own country or in a particular tax system. Cultural differences among committee members should be taken into account. Both regular and associate members will be considered for any position within the committee [including the chair.]

Six (6) English-speaking members to include:

- three (3) U.S. or Canadian members, including the chair
 - three (3) non-U.S. or Canadian members, representing one each within the following regions:
 - (1) Asia/Australia/Oceania
 - (2) Europe/Middle East/Africa
 - (3) Latin America/Caribbean
- Region is based on current permanent residence.

(d) Reporting Contact

Committee chair to report directly to the Executive Board

(e) Products

The International Strategic Plan

Translation agreement recommendations

Committee appointment recommendations

Overseas travel recommendations
IAAO Ambassador Program recommendations
Report on international membership
October 10, 2013 Added the International Committee.

11.3.16 Nominating Committee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by ensuring a geographically balanced and qualified slate of candidates to lead IAAO. This committee should recognize the importance of selecting good leaders who understand and will promote accurate property valuation, property tax administration, and property tax policy worldwide. This committee should seek out and foster future leaders who acknowledge and understand the mission of the organization. The committee should carefully evaluate the candidates who are nominated to ensure they will be thoughtful stewards of the Association.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) review all goals and objectives in the Strategic Plan to ensure that the goals and objectives promote leadership growth within the Association
- (2) recommend new goals and objectives specifically encouraging involvement and participation of new leaders to the Planning and Rules Committee for inclusion in the Strategic Plan
- (3) identify current and potential candidates who would be willing to serve the Association and support its mission and commitments
- (4) report to the Executive Board on these activities
- (5) review campaign reports of individual campaign expenditures
- (6) recommend new goals and objectives to provide the desired mix of services to the Budget Committee for inclusion in the Strategic Plan
- (7) cooperate with the Membership Services Committee to develop services for members
- (8) present ideas and topics for seminars and the annual conference
- (9) review geographic makeup of election regions every five (5) years beginning in 2012 and maintained as in Appendix A of these Procedural Rules.

(c) Members

Six (6) members including the following:

- Immediate Past President, committee chair
- four (4) regular members
- one (1) associate member.

(d) Reporting Contact

The committee chair reports to the Executive Board.

(e) Products

- (1) list of nominees
- (2) report of campaign expenditures

- (3) geographic election regions, which are reviewed every five (5) years in accordance with section 8.1.2.9 and maintained as Appendix A in these Procedural Rules

11.3.17 Local Host Subcommittee

(a) Purpose

The purpose of this committee is to support the mission and commitments of IAAO by ensuring that the annual conference host city arrangements are properly facilitated. This important function lays the foundation for discussion, research, education, and professional advancement for property valuation, assessment administration, and property tax policy at the IAAO Annual Conference.

(b) Responsibilities

In addition to special projects assigned by the Executive Board, this committee should annually

- (1) respond to requests for advice
- (2) state the needs of committee members and assist in host city conference arrangements
- (3) identify and recommend a variety of social activities for the annual conference to IAAO staff
- (4) suggest and identify sources and opportunities for funding the IAAO Annual Conference to IAAO staff
- (5) report to the Executive Board on activities
- (6) coordinate with the Membership Services Committee to develop services for members pertaining to the annual conference
- (7) work with the Conference Content Committee in presenting ideas and topics for the annual conference
- (8) provide volunteers to assist with the annual conference
- (9) assist with special projects related to the annual conference.

(c) Members

As required for adequate representation, with a maximum of eight (8) members (one appointed as committee chair).

(d) Reporting Contact

The committee chair reports directly to the Executive Board.

(e) Products

- interim reports
- recommended social program for the annual conference.

April 26, 2014 Removed section 11.4.3 Councils and Sections and renumbered.

12 Section 12. Member Organizations

12.1 MEMBER ORGANIZATION OPERATIONS

Member organizations may act only within the scope of their authority as provided by the Bylaws, Procedural Rules, or the Executive Board and within the provisions of the Strategic Plan and budget.

12.1.1 Member Organization Categories

12.1.1.1 Chapters and affiliates shall be external member organizations with representation.

12.1.1.2 Clubs and networks shall be considered internal member organizations and are further defined as follows:

- (a) Clubs are individuals organized to share interest in social, support, or informal advisory roles.
- (b) Networks are individuals interested in cooperating to share information.

April 26, 2014 Removed all reference to councils and sections.

12.2 CHAPTERS

12.2.1 General Provisions

It is the policy of IAAO to encourage the formation of chapters that will advance the mission and commitments of the Association as stated in Article I of the IAAO Constitution and in the Association's current Strategic Plan.

12.2.1.1 The following terms and definitions apply:

- (a) "Association" means the International Association of Assessing Officers, Inc.
- (b) "Executive Board" means the Executive Board of the International Association of Assessing Officers, Inc.
- (c) All references to title of offices, such as president, president-elect, and the like, refer to officers of the Association unless otherwise indicated.

12.2.1.2 The Association is an international organization of individual members, and a grant of authority to organize chapters shall not affect the relationship existing between the Association and its members.

12.2.1.3 Chapters shall have the right to undertake a program or activity for the benefit of chapter members, but any such program shall always be subordinate to, and not in conflict with, the program and activities of the Association.

12.2.2 Geographic Formation of Chapters

- (a) A chapter may be formed in any country, state, province, region, or locality.
- (b) If a regional chapter is to be formed, the assessment districts included in that chapter must be approved by the Chapters and Affiliates Subcommittee.
- (c) No chapter may be formed in a jurisdictional area that includes any of the jurisdictional area of an existing chapter(s).

- (d) If such a conflict occurs between a proposed chapter and an existing chapter(s), the Chair of the Chapters and Affiliates Subcommittee will contact the chapters involved to resolve the conflict.
- (e) If the existing chapter consents to changing its jurisdictional area, that chapter's charter and Bylaws shall be amended to reflect the jurisdictional change.
- (f) If the existing chapter does not agree to a change in its jurisdiction, the proposed chapter shall amend its petition and Bylaws excluding the overlapping jurisdictional areas.

12.2.3 Chapter Petition

12.2.3.1 Members seeking to form a chapter must file a petition with the Executive Director of the Association. The Executive Director shall forward the petition to the Chapters and Affiliates Subcommittee for review.

12.2.3.2 The petition shall contain a statement

- Outlining the purpose for forming the chapter and the activities in which the chapter intends to engage, the potential membership in the jurisdictional area covered, and a description of the way in which the objectives of the Association will be advanced by granting the chapter a charter.
- Signed by not less than five (5) members of the Association in good standing on the date of the signing. The printed name of each signing member shall appear next to his or her signature.

12.2.3.3 If the petition is in order, a copy of it shall be sent to the Executive Board.

12.2.3.4 At its next meeting, the Executive Board shall either grant or deny the petition to form a chapter.

12.2.3.5 The Executive Director, or designated member of the staff, shall notify the petitioners of the action taken as soon as practicable.

12.2.3.6 If the petition is approved, the petitioners have the authority to draft a set of Bylaws to govern the operation of the chapter.

12.2.3.7 The petitioners may file the petition and chapter Bylaws together in the manner outlined above.

12.2.4 Chapter Bylaws

12.2.4.1 General provisions for the organization and charter of chapter are as follows:

- (a) No chapter shall be considered organized or its Bylaws effective until the Bylaws or amended Bylaws have been reviewed by the Chapters and Affiliates subcommittee with legal review if necessary and approved by the Executive Board.
- (b) Such approval shall be evidenced by the granting of a charter to the chapter by the Association. The chapter may conduct business relating to the formation of the chapter from the date of committee approval until the actual charter is issued.

- (c) The Executive Director or designated member of the staff shall notify the chapter of approval as soon as practicable.
- (d) The Association shall furnish the applicant chapter with a copy of a sample petition and chapter Bylaws as a guide for drafting the chapter petition and Bylaws.

12.2.4.2 The chapter Bylaws shall include the following:

- (a) An official name of the chapter in the form “(Name of jurisdictional area) Chapter of the International Association of Assessing Officers”
- (b) A definition of jurisdictional area
- (c) A statement that the purpose of the chapter is the advancement of the objectives of the Association in the jurisdictional area of the chapter. The Bylaws may provide for additional purposes as long as those purposes are not inconsistent with the goals and objectives of the Association.
- (d) A statement as to membership eligibility in the chapter
- (e) The identification of a governing body of the chapter, preferably to be called the Executive Committee. The governing body shall be made up of the chapter officers and as many other chapter members as necessary to operate the chapter properly.
- (f) A statement describing chapter officers and the duties of each office.

12.2.4.3 Membership may be restricted to members in good standing of IAAO, or membership may be open to any person interested in the assessment profession provided that only members in good standing of IAAO may hold chapter office or serve on the governing body. All chapter members shall be subject to the same code of conduct and ethics as IAAO members.

12.2.4.4 The Bylaws may provide for different classifications of chapter membership.

12.2.4.5 The chapter Bylaws may provide for a schedule of membership dues independent of Association dues. If the chapter has different membership classifications, the chapter Bylaws may provide for different classes of dues for the different membership categories.

12.2.4.6 The chapter Bylaws shall not provide for any method of payment of Association dues.

12.2.4.7 The chapter Bylaws may restrict voting rights to certain classes of members provided that the right to vote is at all times open to IAAO regular and life members.

12.2.4.8 A chapter may restrict the right to hold office and serve on the governing body to any group or groups of IAAO members provided that the right to hold office and serve on the governing body shall always be open to IAAO regular members.

12.2.4.9 The chapter may select one IAAO Representative from the chapter’s jurisdictional area to serve as an ex-officio member of the chapter governing body. The secretary shall

notify the IAAO Representatives in the chapter's jurisdictional area of regular chapter meetings.

12.2.4.10 The Bylaws may provide for as many standing and other committees as the chapter deems necessary to carry out its objectives. All committees shall perform their duties in accordance with the chapter Bylaws and shall be subject, in all matters, to approval by the chapter governing body.

12.2.5 Chapter Officers

12.2.5.1 At minimum, the Bylaws must provide for a president, secretary, and treasurer of the chapter.

12.2.5.2 The Bylaws must provide for a method of succession in the event that an officer is unable to complete his or her term.

12.2.5.3 The duties of the president, secretary, and treasurer shall include those defined in the remainder of this section. The Bylaws must provide a requirement that an officer, governing body member, or committee chair, at the end of his or her term, shall turn over the chapter books and records that have been his or her responsibility to the incoming member.

12.2.6 Chapter Elections

12.2.6.1 A method shall be provided for the annual nomination and election of officers and members of the governing body that shall ensure proper representation of the chapter membership.

12.2.6.2 Selection of candidates to serve as officers and members of the governing body shall be done by a committee (preferably called the Nominating Committee) appointed by the chapter president.

- (a) The committee shall consist of no fewer than three (3) chapter members who are members in good standing of the Association.
- (b) Appointment to the committee may be restricted to any group or groups of IAAO members provided that committee membership shall always be open to IAAO regular members.
- (c) The committee shall be responsible for reporting its selection to the chapter governing body at a designated time prior to the chapter's annual meeting sufficient to permit adequate notification to the voting membership of the candidates and selection date and to prepare the ballots.
- (d) The committee shall select at least one (1) eligible candidate for each office and place to be filled on the governing body.

12.2.6.3 The chapter Bylaws may provide that, at the time the Nominating Committee makes the nomination for each elective office, additional nominations may be taken from the floor.

- 12.2.6.4 The voting may be done by secret ballot mailed to the voting chapter members or by secret ballot taken at the annual meeting. The ballots shall provide for write-in candidates.
- 12.2.6.5 In the event that the committee selects only one (1) candidate for each office and place to be filled on the governing body, the chapter need not go to the expense of providing secret ballots to the membership. If such occurs, the voting may be done by voice vote at the annual meeting.
- 12.2.6.6 It shall be the responsibility of the secretary to prepare and distribute the ballots in a timely manner to ensure that all voting members have adequate time to respond. If voting is to be done at the annual meeting, the ballots may be distributed at that time.
- 12.2.6.7 The committee shall be responsible for counting the ballots and reporting the vote count to the chapter president.
- 12.2.6.8 In the event of a tie vote, the winner will be determined by rules outlined in the chapter Bylaws.
- 12.2.6.9 The chapter president shall be responsible for notifying the candidates and the governing body of the election results and for posting the results at the annual meeting.
- 12.2.6.10 Members of the governing body and officers may be elected for any length term of office provided that no such term is less than from one annual meeting to the next annual meeting.
- 12.2.6.11 Elections are to be held annually. If the term of any elected position is for longer than one (1) year, the terms shall be staggered.

12.2.7 Chapter Meetings

- 12.2.7.1 The chapter shall establish a method for calling regular and special meetings of the chapter and its governing body.
- 12.2.7.2 A chapter shall hold at least one annual meeting of the general chapter membership and the governing body.
- 12.2.7.3 The chapter may schedule additional regular meetings of the membership and governing body.
- 12.2.7.4 Special meetings of the governing body may be held on the call of the chapter president or upon written request by any number of governing body members specified in the chapter Bylaws.
- 12.2.7.5 It shall be the responsibility of the chapter secretary to notify the general membership of regular meetings and to notify the governing body of special meetings.

12.2.7.6 It shall be the responsibility of the chapter secretary to keep the minutes of each regular and special meeting held. A copy of the minutes shall be available to the Executive Director or designated staff of the Association, as well as the chapter members, after their approval by the governing body of the chapter.

12.2.7.7 The chapter secretary shall prepare an annual report of the chapter activities, a list of all chapter members, officers, and governing body members and submit it to the Executive Director or designated staff of the Association no later than ten (10) days after the chapter's annual meeting.

12.2.7.8 The Bylaws shall state what constitutes a quorum for conducting regular and special meetings.

12.2.8 Duties of the Officers

12.2.8.1 *Duties of the President*

(Reserved)

12.2.8.2 *Duties of the Secretary*

- (a) Notify the general membership of regular meetings and to notify the governing body of special meetings.
- (b) Keep the minutes of each regular and special meeting held. A copy of the minutes shall be sent to the Executive Director of the Association after their approval by the governing body of the chapter.
- (c) Annually prepare a list of all chapter members, officers, and governing body members and submit it to the Executive Director or designated staff of the Association no later than ten (10) days after the chapter's annual meeting.

12.2.8.3 *Duties of the Treasurer*

- (a) Devise methods for the receipt and disbursement of chapter funds, the keeping of accounting records and the auditing of such records, and preparation and adoption of a budget to cover chapter activities.
- (b) Prepare annually a report of chapter finances. The report shall include a statement of receipts, disbursements, and balances for the reporting year.
- (c) Annually prepare a financial report detailing the chapter's receipts, disbursements, and balances. Such report shall be available to the Executive Director, or designated staff of the Association, and chapter members upon request.
- (d) File all necessary tax returns.

12.2.9 Amending the Chapter Bylaws

12.2.9.1 Amendments to chapter Bylaws, after adoption by the chapter membership, shall be certified by the secretary of the chapter and delivered to the Executive Director of the Association. The Executive Director shall forward the amended bylaws to the Chapters and Affiliates Subcommittee for review.

12.2.9.2 If the amended bylaws are in order, the Executive Director, or designated staff member, shall send a copy of the amended Bylaws to the Executive Board for consideration at its next meeting.

12.2.9.3 The Executive Director shall notify the chapter of the action taken as soon as possible.

12.2.10 Miscellaneous Provisions

12.2.10.1 No chapter shall investigate or hold hearings on an IAAO ethics complaint. All such complaints shall be forwarded to the Executive Director of the Association in accordance with section 3.6.1 of these Procedural Rules.

12.2.10.2 Any disciplinary action imposed by IAAO against a chapter member shall be binding on the chapter. For example, if a chapter member is expelled from IAAO, that member shall also be expelled from the chapter.

12.2.10.3 A chapter is required to have at least fifteen (15) members of IAAO in good standing within five (5) years from the date of its charter in order to retain its charter.

- (a) Whenever that number falls below fifteen (15), the chapter shall have twelve (12) months to increase its membership to fifteen (15) or more IAAO members in good standing.
- (b) If the chapter does not increase its membership to fifteen (15) IAAO members within twelve (12) months, the chapter charter may be revoked.

12.2.10.4 A chapter may publish a chapter newsletter or other material provided that the published material

- (a) clearly shows on its face that it was printed by the chapter and not by IAAO
- (b) states the name of the editor or author
- (c) contains no libelous matter.

12.2.10.5 A chapter charter may be revoked by action of the Executive Board at any time if in its judgment

- (a) the chapter has violated any of the provisions of the IAAO Constitution, Bylaws, or these Procedural Rules, or
- (b) revocation will serve the best interest of the Association.

12.2.10.6 No chapter shall have authority to enter into any contract that imposes liability on the Association.

12.2.10.7 A chapter or chapter member shall not engage in any lobbying activities in the name of or on behalf of the chapter or the Association unless approved by the Executive Board.

12.2.10.8 The chapter Bylaws shall not include any test of eligibility for chapter membership, voting rights, or right to hold office, beyond those prescribed in these regulations, other than the payment of the chapter dues.

12.2.10.9 In the event that a chapter is dissolved or its charter is revoked, all chapter funds shall be turned over to the Association.

12.2.10.10 A chapter may apply for tax-exempt status.

12.2.10.11 Each person who joins a chapter agrees that he or she will exercise diligence and care and use good business judgment in his or her relations with the chapter and with others involved in chapter matters. Each chapter member agrees not to act beyond the scope of his or her authority or in such a manner as will subject the Association to legal liability and agrees not to institute a lawsuit against the Association.

12.3 AFFILIATE MEMBERSHIP

12.3.1 Any organization or association of public officials, employees, and/or citizens interested in property valuation for property tax purposes, property tax administration, or property tax policy may apply for affiliate membership.

12.3.2 All applications for affiliate membership shall be sent to and reviewed by the Chapters and Affiliates Committee with legal review if necessary and the Executive Director for compliance with membership requirements. The Executive Director shall submit a list of all applications received for affiliate membership showing which applications met the membership requirements to the Executive Board for approval at its next meeting.

12.3.3 Application for affiliate membership shall include the following information:

- (a) a completed application form
- (b) a copy of the organization's resolution for application for affiliate membership in IAAO
- (c) a copy of the applicant organization's constitution or comparable governing documents
- (d) a list of the organization officers and their addresses
- (e) a statement explaining why the organization wishes to become an affiliate member.

12.3.4 Affiliate members shall receive the following:

- (a) a copy of each membership mailing
- (b) copies of all IAAO membership periodicals
- (c) regular notification of upcoming meetings and events and new publications
- (d) one (1) password access to the membership-only portion of the IAAO Website
- (e) member discount rates on IAAO books, materials, and registration for all IAAO events, including seminars and the annual conference, for one (1) person.

12.3.5 Affiliate members may reprint articles from IAAO periodicals in affiliate members' publications, after receiving prior permission, in accordance with section 15.3.3 of these Procedural Rules.

April 26, 2014 Removed section 12.4 Councils and Sections and renumbered Clubs and Networks.

12.4 CLUBS

The purpose of clubs is to support the mission and commitments of IAAO through groups that are informally organized. Clubs provide forums for social interaction, professional support, or informal advisory roles.

April 26, 2014 Removed reference to councils and sections.

12.4.1 Identification of Clubs

The Executive Board may authorize a qualifying group to be called a club.

12.4.2 Selection of the Governing Body

Each club shall select its own chair. A club may select its own governing body if it determines that a governing body is necessary.

12.4.3 Products and Services

Clubs are neither required to provide nor prohibited from providing products or services.

12.4.4 Funding

12.4.4.1 Clubs may apply to have special fund accounts. Any club with a special account shall make an annual financial report to the Budget Committee detailing all revenues and expenses. In order to facilitate financial reporting by clubs, staff shall provide copies of monthly account statements to the chair of each club that has an established special account.

April 5, 2013 Removed references to Procedural Rules section 6.8 and 6.5.2.4 and added 'detailing all revenues and expenses.'

12.4.4.2 Clubs must be self-sufficient immediately and may charge dues, which need not be related to products or services.

12.4.5 Club Descriptions

- (a) The purpose of these clubs is to support the mission and commitments of IAAO by offering assistance, support, and encouragement to candidates for professional designations. These clubs are organized at state, province, city, or county level.
- (b) These clubs should annually
 1. respond to requests for advice from candidates
 2. cooperate with the Professional Development Committee to develop services for candidates.

12.5 NETWORKS

The purpose of networks is to support the mission and commitments of IAAO through groups that are informally organized. Networks shall be individuals interested in cooperating to share information.

April 26, 2014 Removed reference to councils and sections.

12.5.1 Identification of Networks

The Executive Board may authorize a qualifying group in this category to be called a network.

12.5.2 Selection of the Governing Body

Each network shall select its own chair. A network may select its own governing body if it determines that a governing body is necessary.

12.5.3 Products and Services

Networks are neither required to provide nor prohibited from providing products or services.

12.5.4 Funding

12.5.4.1 Networks may apply to have special fund accounts. Any network with a special account shall make an annual financial report to the Budget Committee detailing all revenues and expenses. In order to facilitate financial reporting by networks, staff shall provide copies of monthly account statements to the Chair of each network that has an established special account.

April 5, 2013 Removed references to Procedural Rules section 6.8 and 6.5.2.4 and added 'detailing all revenues and expenses.'

12.5.4.2 Networks must be self-sufficient immediately and may charge dues, which need not be related to products or services.

13 SECTION 13. TRUSTS, GRANTS, AND SCHOLARSHIPS

13.1 JEFF HUNT, CAE, MEMORIAL CANDIDATES ASSISTANCE TRUST

13.1.1 This trust was set up to assist those candidates who have a financial need in preparing reports or in meeting educational requirements. The trust is administered by a five- (5-) member committee.

13.1.2 All grants must be requested on the proper application.

13.1.3 Contributions are also accepted.

13.1.4 The committee is appointed by the President for staggered five- (5-) year terms, with one (1) appointment being made annually.

13.2 TIMOTHY N. HAGEMANN MEMORIAL MEMBERSHIP TRUST

13.2.1 Mission

The Timothy N. Hagemann Memorial Membership Trust was created in honor of Timothy N. Hagemann of Kansas, a long-time supporter of the professionalism of assessors, especially through professional bodies such as the Kansas County Appraisers Association and the International Association of Assessing Officers. This trust was established after Tim's death in 1993.

13.2.2 Purpose

The purpose of the Timothy N. Hagemann Memorial Membership Trust is to

- (a) assist deserving individuals, especially those from rural areas, in becoming members of IAAO and/or maintaining their membership in IAAO
- (b) assist deserving individuals, especially those from rural areas, in gaining professionalism with grants for costs associated with taking an IAAO educational course
- (c) support improved assessments in rural areas by supporting research projects for issues that are important to rural appraisers. (This support may be in the form of financial rewards for the publication of technical articles on rural issues or special-purpose properties found in rural areas or may be direct grants for research activities concerning rural issues.)

The Timothy N. Hagemann Memorial Membership Trust is designed to exist into perpetuity.

13.2.3 Administration

The Timothy N. Hagemann Memorial Membership Trust shall be administered by a three- (3-) member committee, each of whom shall serve a three- (3-) year term. The terms will be staggered and will be coterminous with the term of the IAAO President. The chair of the committee shall be appointed by the President of IAAO, and the other two members shall be IAAO members appointed by the President of the Kansas County Appraisers Association. A majority vote is necessary to conduct committee business.

13.2.4 Day-to-Day Operations

Day-to-day operations of the trust shall be the responsibility of the IAAO Executive Director. Vacancies on the committee shall be filled by either the President of IAAO or the President of KCAA, depending on who made the initial appointment. IAAO and KCAA are authorized to receive contributions of money or other property from any source. Authority for dispersing grants shall be in the Trust Committee. With the approval of the Trust Committee, the IAAO Executive Director has the authority to write checks on the fund. No part of the trust shall inure to the private benefit of the administrators or the members of the committee.

13.2.5 Distribution of Proceeds

The proceeds of the trust will be distributed to deserving individuals who need financial assistance in becoming IAAO members and/or renewing their IAAO memberships and to individuals who require financial assistance to take IAAO educational courses, and to individuals or groups for research of issues that are important to rural appraisers. Awards may be granted to individuals for articles in IAAO publications that deal with rural issues.

13.2.6 Rules to Determine Recipients

For the purposes of assisting deserving individuals, especially those from rural areas, in becoming members of IAAO or maintaining their IAAO membership, the committee will give primary consideration to assessing officials who work full-time in jurisdictions that are rural in nature as determined by the committee. Private-sector individuals are not eligible for grants. The committee will take into consideration the budgetary constraints of the jurisdiction and the level of professional commitment of the applicant.

Applicants must submit an application on the prescribed form. Only one (1) applicant from any one (1) jurisdiction will be approved in any one (1) year. Only one (1) grant may be made to one (1) individual in a calendar year.

Membership fees will be charged at the lowest generally available rate in existence at the time of application. IAAO will be paid at this rate by the trust.

For purposes of assisting deserving individuals in gaining professionalism by grants for costs associated with taking an IAAO educational course, the committee will give primary consideration to assessing officials who work full-time in jurisdiction that are rural in nature as determined by the committee. Educational grants may be for any amount up to the full tuition and travel costs. Grants will be based on need and professional goals.

For purposes of supporting improved assessments in rural areas by supporting research projects for issues that are important to rural appraisers, grants may be made to individuals or groups who conduct such research. Projects must be approved in advance and may be eligible for funds up to the entire direct costs, excluding salaries, of the project.

Applicants must submit an application on the prescribed form. Only one (1) application from the same individual or group may be approved in any calendar year. Actual payment of the awards will not be made prior to a complete report of the results of the research.

The trust may also grant financial awards to individuals for technical articles on rural issues published in an IAAO publication. The granting of this award is completed at the discretion of the Trust Committee. Published articles on rural issues will be reviewed by the committee and a decision made as to the amount of any award that may be granted. The decision will be based upon the appropriateness of the article, the perceived importance of the topic, as well as the availability of funds.

An unlimited number of grants can be awarded each year, subject to the availability of funds and the other above constraints.

13.2.7 Depository of Fund Assets

The Assets of The Timothy N. Hagemann Memorial Membership Trust will be deposited in the primary financial institution of IAAO.

13.2.8 Dissolution

At dissolution of the trust, any remaining proceeds will be given to IAAO to defray educational costs of its members.

13.3 FRIENDS OF THE IAAO PAUL V. CORUSY LIBRARY TRUST

13.3.1 Mission

The Friends of the Paul V. Corusy Library Trust was created in recognition of the needs of all members searching for information in mass appraisal, tax assessment, and tax policy throughout the world. This trust was established in 1997

13.3.2 Purpose

The purpose of the Friends of the Paul V. Corusy Library Trust is to

- (a) assist members by providing funds to do research in the field of mass appraisal, tax assessment, and tax policy throughout the world
- (b) assist the library with purchases of written and electronic materials to be used in the library
- (c) support the functions of the library as it is currently performing and identify ways to disseminate information to IAAO members
- (d) support the library with additional purchases of equipment as necessary to enhance the operations to serve the members of IAAO.

The Friends of the Paul V. Corusy Library Trust is designed to exist into perpetuity.

13.3.3 Administration

The Friends of the Paul V. Corusy Library Trust shall be administered by a three- (3-) member committee, each of whom shall serve a three- (3-) year term. The terms will be staggered and will be coterminous with the term of the IAAO President. The chair of the committee shall be appointed by the President of IAAO for a one- (1-) year term. A majority vote is necessary to conduct committee business.

13.3.4 Day-to-Day Operations

- (a) Day-to-day operations of the trust shall be the responsibility of the IAAO Executive Director or his or her designee.

- (b) The IAAO President will make appointments to vacancies on the Trust Committee.
- (c) IAAO is authorized to receive contributions of money or other property from any source.
- (d) Authority for dispersing grants or expenditures shall be the responsibility of the Trust Committee.
- (e) With the approval of the Trust Committee, the IAAO Executive Director or his or her designee has the authority to write checks on the fund.
- (f) No part of the trust shall inure to the private benefit of the administrators or the members of the committee.

13.3.5 Distribution of Proceeds

The proceeds of the trust will be distributed to deserving research papers, educational material, reference material, or equipment that are important to all IAAO members, IAAO groups, or articles in IAAO publications.

April 26, 2014 Removed reference to councils and added "IAAO groups".

13.3.6 Rules to Determine Recipients/Purchases

Authority for dispersing grants or expenditures shall be the responsibility of the Trust Committee. With the approval of the Trust Committee, the IAAO Executive Director or his or her designee has the authority to write checks on the fund. Applications must be submitted in writing on the prescribed form.

The number of purchases or grants awarded each year will be subject to the availability of funds or other constraints.

13.3.7 Funds

The Kansas City Chapter of IAAO pledged \$1,500 to be contributed by December 1997 to initially capitalize the fund.

In concert with the fund-raising resources of IAAO, the Trust Committee will take the lead in conducting fund-raising campaigns to bring the trust up to its initial goal of \$25,000. Grants will be awarded only from the interest earned on the principal of the trust or from any donations received above the minimum funding level of \$25,000. An unlimited number of grants may be awarded each year subject to the availability of funds in excess of the initial corpus goal.

13.3.8 Depository of Fund Assets

The assets of the Friends of the IAAO Paul V. Corusy Library Trust will be deposited in the primary financial institution of IAAO.

13.3.9 Dissolution

At dissolution of the trust any remaining proceeds will be given to IAAO to defray library costs or educational costs of its members.

13.4 IAAO SCHOLARSHIP FUND

- (a) This fund was established to provide scholarships for IAAO members to participate in Association programs and activities. The fund is administered by the Scholarship Committee.

- (b) All funds requested must be requested on the approved application.
- (c) Contributions are also accepted.
- (d) The committee is appointed by the President.

13.4.1 Mission

The mission of the Scholarship Committee is to fairly and impartially distribute the Scholarship Funds provided by the IAAO Executive Board and the Barbara Brunner Funds provided through donations.

13.4.2 Purpose

The purpose of the scholarship is to provide financial assistance to deserving members of IAAO so they may attend the Association's educational opportunities.

13.4.3 Administration

The IAAO Scholarship fund shall be administered by a three- (3-) member committee appointed by the IAAO President for a one- (1-) year term. A majority vote is necessary to conduct committee business.

13.4.4 Day-to-Day Operations

The fund will be administered by the members of the Scholarship Committee.

13.4.5 Rules to Determine Recipients

Applicants must submit an application on the prescribed form. The Scholarship Committee shall determine the merits of each application and award scholarships to deserving individuals.

13.4.6 Funds

The IAAO Executive Board shall budget funds on an annual basis within the IAAO operating budget.

13.5 BARBARA BRUNNER SCHOLARSHIP FUND

13.5.1 Mission

The Barbara Brunner Scholarship Fund was created to provide registration scholarships for members of IAAO to attend the Association's Annual Conference.

13.5.2 Purpose

The purpose of the scholarship is to provide financial assistance to deserving members of IAAO so that they may attend the Association's Annual Conference.

13.5.3 Administration

All requests for financial assistance must be submitted on the proper application.

13.5.4 Day-to-Day Operations

The Fund will be administered by the members of the Scholarship Committee.

14 SECTION 14. IAAO REPRESENTATIVES

14.1 PURPOSE

IAAO Representatives represent members in all areas of property valuation, property tax administration, and property tax policy and provide outreach to existing and potential members. This outreach includes increasing and retaining membership. IAAO Representatives are the “sales force” of IAAO, showing people how the Association is able to serve. The representatives should give constant feedback to the quality of services provided by the Association. IAAO Representatives should understand the mission, commitments, philosophy, and vision of IAAO. They must be knowledgeable about the Association and articulate in delivering the Association’s message.

14.2 APPOINTMENTS FOR AFFILIATES AND CHAPTERS

14.2.1 Criteria

- (a) The recommended appointee must be an IAAO member in good standing.
- (b) The recommended appointee must be a member of the affiliate or chapter that he or she would represent.

14.2.2 Appointment Process

- (a) By May 1 of each year, the affiliate or chapter choosing to select representatives shall notify headquarters of its selection.
- (b) Affiliates and chapters can recommend up to four (4) representatives with staggered terms.

14.3 APPOINTMENTS FOR NON-AFFILIATE LOCAL ORGANIZATIONS

- (a) The recommended appointee must be an IAAO member in good standing.
- (b) The appointee must be a member of the non-affiliate organization that he or she would represent.

14.4 PRESIDENTIAL APPOINTMENTS

The IAAO President has the option of appointing additional representatives for states, provinces, and countries.

14.5 REPRESENTATIVE TERMS

The selection process should be set up in such a way that representatives’ terms are staggered and that current representatives are allowed to serve their complete term.

15 SECTION 15. MISCELLANEOUS

15.1 DISSOLUTION

(Reserved for future use)

15.2 USE OF IAAO LOGOS

15.2.1 The federal registration symbol must be used in connection with the IAAO logo.

15.2.2 The IAAO logo may be used to identify a member of the Association in good standing. The IAAO logo may not be used to identify companies or groups that are not IAAO member groups.

The professional designation logos may be used only by designated IAAO members in good standing.

15.2.3 The IAAO logo may appear on stationary and business cards of IAAO members. IAAO logos may not be incorporated as part of or assimilated into a business name, business logo, or corporate identity. The IAAO logo may be used by IAAO Chapters and Affiliates in conjunction with chapter and affiliate logos provided that the IAAO logo remains unchanged and separate from the chapter logo.

April 26, 2014 Added provision for IAAO Chapters and Affiliates to use the logo.

15.2.4 The logos may only be reproduced in the colors and formats provided by the Association.

15.2.5 The logos must not be altered except that they may be resized.

15.2.6 Exceptions to section 15.2 of these Procedural Rules require express written permission of the IAAO Executive Director.

15.2.7 Any violation of the logo use policy may result in remedial action.

15.3 USE OF COPYRIGHTED MATERIAL

15.3.1 Most material published by the Association is copyrighted © material. With respect to its copyrighted material, the Association retains the right to do and to authorize any of the following as provided by Section 106 of the Copyright Act of 1976 and all subsequent amendments:

- (a) to reproduce the copyrighted work
- (b) to prepare derivative work based upon the copyrighted work
- (c) to distribute the copyrighted work to the public.

The Association, by granting limited nonexclusive rights to others, does not restrict or limit its own exclusive copyright rights.

15.3.2 All requests to use Association copyright-protected material must be made in writing to the Executive Director and must be specific as to the material to be used, the length of time it will be used, and the nature of the use. Grants or denials will be in writing, will be dated, and will be similarly specific. Notification by e-mail shall be considered notification in writing, provided that all other conditions are met. In all cases the granting of permission must include a requirement that appropriate credit be given to the Association with an indication that the Association retains the copyright.

15.3.3 Chapters, agencies, affiliates, and members have the privilege of reprinting IAAO articles in their periodicals after submitting notification to IAAO. Upon approval, a blanket permission statement will be issued identifying copyright and use restrictions, provided that the Association retains the copyright to the material reprinted. The reprint must credit the Association and the site name and issue of the periodical from which the material was reprinted.

15.3.4 The following is a list of information to be obtained from a party requesting permission to use Association material:

- (a) intended use and distribution of the materials to be used including page number, chapter, and, if possible, a copy of the work in which the material will be reproduced
- (b) length of time that the material will be used and number of copies to be published
- (c) whether the materials will be sold, and if sold, the price charged
- (d) type of reproduction (photocopy, typeset, video, Web, and so on)
- (e) the fee charged, if any, for use of material.

15.3.5 For permission requests that substantially affect IAAO or the requestor financially, the above information, including any fee for the use of the material, as well as all other information pertaining to the permission, is to be given to the Executive Director, who shall forward it to the Association counsel for review and recommendation of approval or denial. Requests that potentially represent an economic loss to the Association (\$500.00 or more) must be discussed with the Executive Board before approval or denial is granted.

15.3.6 Any violation of the copyright or permission to use the copyrighted material shall be referred to the Association counsel and to the Ethics Committee. When the violation involves the use of education material, such as course materials and student handbooks or workbooks, the violation shall also be referred to the Professional Development Committee.

15.4 USE OF EDUCATIONAL MATERIAL

15.4.1 In addition to the above requirements, requests to use educational materials must be coordinated with and approved by the Executive Director, who shall confer with the Director of Professional Development. The Executive Director shall provide an annual report to the Professional Development Committee with an accounting of the use of all education materials used by other individuals, chapters, affiliates, or agencies.

15.4.2 Materials for educational courses containing an examination are not to be released for inclusion into non-Association courses, except with written approval from the Executive Board.

April 26, 2014 Removed section 15.5 Local Activity Grant and renumbered following sections.

15.5 IAAO ACCREDITED MEMBER PROGRAM

15.5.1 The purpose of the IAAO Accredited Member Program is to provide recognition to IAAO members who have completed significant education and experience requirements.

15.5.2 To qualify for the IAAO Accredited Member Program, the applicant must meet the following requirements:

- (a) be a member of IAAO in good standing
- (b) have successfully completed one hundred and eighty (180) hours of IAAO education courses and workshops, including courses 101, 102, and 400
- (c) Residents of the United States are required to successfully complete IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. may provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course
- (d) have at least five (5) years of experience in the assessment profession
- (e) pay an annual fee.

15.5.3 Upon approval of the application, the applicant will be issued a certificate of accreditation. No pins or logos will be established to recognize the accreditation. Reference can be made on business cards and correspondence below the name as "IAAO Accredited." Accredited members residing outside of the United States may substitute proof of completion of 14 hours of education courses covering the appraisal standards applicable to the member.

15.5.4 The program requires that those receiving the accreditation be re-accredited every five (5) years by successfully completing at least fourteen (14) hours of education courses or seminars on the Standards of Practice and Professional Ethics or USPAP. Approved courses include IAAO Workshops 151, 171, and 191; the two- (2-) day Appraisal Foundation-approved USPAP course; and the one- (1-) day Appraisal Foundation-approved USPAP update course. An additional thirty (30) hours of IAAO education courses and workshops must be completed within the five- (5-) year accreditation cycle. Accredited members residing outside of the United States may substitute proof of completion of 14 hours of education courses covering the appraisal standards applicable to the member.

15.6 REQUESTS FOR CREDENTIAL/CERTIFICATION

By request, an individual's academic credentials and/or designations from appraisal organizations that are founding members of The Appraisal Foundation and from state/provincial associations or agencies may be acknowledged in an IAAO publication and promotions for IAAO conference, seminars, workshops, and forums. Not more than three (3) non-IAAO designations shall be listed. The Association is not required to maintain this designation information in the Association's membership database or membership directory.

15.7 TECHNICAL ASSISTANCE POLICY

(a) Mission

The Technical Assistance Program of the Association shall provide the guidance and service to clients in the areas of property tax policy, property tax administration, and valuation. The Technical Assistance Program shall seek those opportunities and activities of an advisory or evaluation nature. The Technical Assistance Program undertaken shall be selected so as to add to the general knowledge and further the research efforts of IAAO.

IAAO services shall be rendered in accordance with Association standards and ethical principles.

The Technical Assistance Program shall be self-supporting and operate at a level of activity that shall yield a contribution to the overall goals and objectives of the Association.

The Technical Assistance Program shall render services by combining the talents and abilities of the professional program of the Association with members who possess knowledge, background, and experience in the areas of client need.

The Technical Assistance Program may engage in all professional activities of property tax policy, property tax administration, and valuation that would benefit members and the general public.

(b) Guidelines

All projects of the Technical Assistance Program shall be priced so as to

- (a) return all project costs (including all staff costs and consulting fees) paid by the Association
- (b) provide some contribution to the general administrative cost of the Association.

All reports generated as a part of a technical assistance project shall comply with all IAAO standards in effect at the time the technical assistance project is completed unless a jurisdictional exception applies.

The technical assistance project team (member and professional staff) shall ensure that all the original raw data and all analyses prepared from the raw data be returned to the client. The project team shall also ensure that IAAO headquarters has an appropriate project file containing copies of data, analyses, and final work product. That file shall be retained for a period of three (3) years after project completion.

The Technical Assistance Program shall not enter into any assignment in which the ultimate work product shall be or must contain an opinion of value.

The Technical Assistance Program shall not accept any assignment in which any technical assistance staff member (either professional staff or member) shall be required to render expert witness testimony in two-party litigation such that the IAAO professional staff or member would be required to become an advocate for one party or another. Technical assistance expert testimony is encouraged in the areas of legislative activities and in the support of litigation for members for which the Association staff members would not become an advocate.

The Technical Assistance Program shall not engage in rendering legal advice.

The Technical Assistance Program shall carefully evaluate assignments that would require the program to be in competition with the substantial segment of the membership of the Association. The staff is required to advise the Executive Director and the chair of the committee whenever such a situation arises. Both the Executive Director and chair of the Technical Assistance Committee must approve technical assistance projects. Should the Executive Director and chair of the Technical Assistance Committee fail to reach a consensus, the President shall approve or disapprove of the technical assistance project.

While serving on the IAAO Technical Assistance Committee, members shall not participate in a compensated position in an active IAAO technical assistance project unless granted special permission by the IAAO President.

15.8 IAAO ROYALTY PRESS

When IAAO enters into an agreement with an individual or group of individuals to publish materials on a shared-revenue basis, a written contract containing the following information is required:

15.8.1 The copyright [©] to all written material will be the property of IAAO.

15.8.2 Royalty fees are to be negotiated by the Executive Director.

15.8.3 An advance of the royalty fees may be negotiated by the Executive Director.

15.8.4 After the expiration date, payment of royalty fees will no longer be required.

15.8.5 Contracts shall require return of the advance to IAAO should the written materials not meet the specifications required.

15.8.6 Contracts must include interim and final completion dates. Failure to meet these deadlines may render the contract null and void.

15.8.7 Contracts must provide for approval by the Executive Director and the appropriate committee Chair.

15.8.8 Up to ten (10) complimentary copies of the published materials will be given to the author(s).

15.8.9 Contracts must contain an “original works” clause, whereby the author attests to the originality of his or her work or provides release agreements for material that will be reproduced in the work.

15.8.10 A royalty fee payment schedule is required, providing an accounting every six (6) months of all sales and payment of any royalties.

April 5, 2013 Changed ‘i, ii, iii’ to ‘15.9.1, 15.9.2 and 15.9.3’ (now 15.8.1, 15.8.2 and 15.8.3).

15.9 TRENDS ANALYSIS AND VALUE SURVEY

15.9.1 The Executive Board should ensure that a periodic Trends Analysis and Value Survey is conducted in support of the planning process. This should be done at least once every five (5) years.

15.9.1.1 Trends Analysis should include anticipated changes in

- (a) the micro environment (social, technological, economic, and political aspects)
- (b) the government environment (structure, financing, regulation, products, work processes)
- (c) the competitive environment (other valuation, assessment administration, and tax policy associations)
- (d) the client environment (valuation, assessment administration, and tax policy associations)
- (e) the internal organizational environment (structure, climate and culture, competencies, shifts in leadership).

15.9.1.2 The Value Survey should include the following:

- (a) review of mission, commitments, philosophy, and vision
- (b) stakeholders analysis
- (c) personal values analysis
- (d) organizational strengths
- (e) organizational weaknesses
- (f) organizational threats
- (g) organizational opportunities.

15.9.2 Steps in the Trends Analysis and Value Survey should be as follows:

15.9.2.1 Prioritize and select issues and projects from the Strategic Plan.

15.9.2.2 Prepare project assignments

- (a) name the project
- (b) describe the desired outcome
- (c) identify tasks to be completed
- (d) provide project timeline
- (e) allocate resources needed such as equipment, people, money, and so on

- (f) suggest sources of information
- (g) describe project parameters such as number of meetings, benchmarks
- (h) state the assumptions of the project.

15.9.2.3 Assign projects to the appropriate committee or work group.

15.9.2.4 Oversee the progress of the project.

15.9.2.5 Evaluate the result and recommend changes to the process.

15.9.3 The Executive Board should establish a special committee to review, revisit, and revise, if necessary, the entire structural focus of the Association no less than every five (5) years beginning with the year 1992. The Executive Director should be responsible for bringing this to the attention of the Executive Board the year prior to the required analysis.

15.10 RELATIONSHIPS WITH OTHER PROFESSIONAL ASSOCIATIONS

(Reserved for future use)

GLOBAL CHANGE:

November 10, 2012 New Procedural Rules Document Approved by the Executive Board.

16 APPENDIX A.

THREE EXECUTIVE BOARD ELECTION REGIONS

To be reviewed by the Nominating Committee in the year 2022 per section 8.1.2.9 of the Procedural Rules
April 22, 2017 – Updated per 8.1.2.9 of the Procedural Rules

REGION 1		REGION 2		REGION 3	
Alaska	49	Connecticut	141	Alabama	44
Arizona	194	Illinois	388	Arkansas	154
California	103	Indiana	205	Delaware	10
Colorado	81	Iowa	149		
Hawaii	55	Maine	77	District of Columbia	6
Idaho	73	Massachusetts	224	Florida	480
Kansas	202	Michigan	256	Georgia	167
Montana	11	Minnesota	137	Kentucky	175
Nebraska	54	Missouri	171		
Nevada	61	New Hampshire	64	Louisiana	181
New Mexico	158	New Jersey	147	Maryland	36
North Dakota	53	New York	191	Mississippi	76
Oklahoma	102	Ohio	169	North Carolina	379
Oregon	194	Pennsylvania	59	South Carolina	71
South Dakota	40	Rhode Island	43	Tennessee	192
Texas	523	Vermont	37	Virginia	362
Utah	129	Wisconsin	112	West Virginia	28
Washington	112	Botswana	1	Barbados	1
Wyoming	43	Cyprus	1	Bahamas	1
Alberta	80	Germany	1	Grenada	1
Australia		14	3	Virgin Islands	3
British Columbia	46	Greece	1		
China	7	Iceland	3		
Guam	1	Ireland, UK	1		
Hong Kong	3	Latvia	1		
Japan	0	Lithuania			
Korea	3	Manitoba	1		
Mexico	1	Mauritius	1		
New Zealand	0	Namibia	14		
Philippines	2	Netherlands	8		
Thailand	1	New Brunswick	4		
Saskatchewan	69	Newfoundland	31		
Yukon Territory	2	Northern Ireland, UK	1		
Northwest Territories	1	Pakistan	20		
		Nova Scotia	34		
		Ontario	7		
		Quebec	1		

		Romania	1		
		Russia	1		
		Scotland, UK	1		
		Slovenia	7		
		South Africa	1		
		South Wales, UK	2		
		Spain	1		
		Turkey	2		
		Zambia			
TOTAL	2467		2400	TOTAL	2367

**17 APPENDIX B.
IAAO AWARDS**

Achievement Awards	Selected by
Distinguished Research and Development Award	Membership Recognition Subcommittee
Property Tax Achievement Award	Membership Recognition Subcommittee
Virginia Cup	Designation Program Manager

Individual Member Awards	Selected by
Clifford B. Allen Most Valuable Member Award	Membership Recognition Subcommittee
Emerging Professional Award	Membership Recognition Subcommittee
Harry Galkin Award	Associate Members Subcommittee
Instructor of Excellence Award	Instructor Relations Subcommittee
International Award	Membership Recognition Subcommittee
Kenneth J. McCarren Award	Chapter/Affiliate/Representative Manager
Member of the Year Award	Membership Recognition Subcommittee
Professional Development Lifetime Achievement Award	Professional Development Committee
Rosalyn Johnston Award	Associate Members Subcommittee
Stacey Ford Award	Chapter/Affiliate/Representative Manager
Verne W. Pottorff, CAE Professional Designee of the Year Award	Professional Development Committee

Jurisdiction/Chapter/Affiliate Awards	Selected by
Distinguished Assessment Jurisdiction Award	Membership Recognition Subcommittee
Outstanding Chapter/Affiliate Award	Membership Recognition Subcommittee
Public Information Program Award	Membership Recognition Subcommittee

Written Communication Awards	Selected by
Bernard L. Barnard Outstanding Technical Essay Award	Membership Recognition Subcommittee
IAAO Journalism Award	Membership Recognition Subcommittee
John A. Zangerle Award	Membership Recognition Subcommittee
John C. Donehoo Essay	Membership Recognition Subcommittee