



IAAO

# Chapter Resource Guide

Working together to promote the growth  
and development of the mass appraisal  
industry around the world



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## TABLE OF CONTENTS

|  |    |
|--|----|
| Introduction . . . . .                               | 2  |
| Strategic Planning . . . . .                         | 3  |
| Member Recruitment & Retention. . . . .              | 4  |
| IAAO Education. . . . .                              | 6  |
| IAAO Designations. . . . .                           | 14 |
| Communication. . . . .                               | 15 |
| Team Building . . . . .                              | 15 |
| Meetings. . . . .                                    | 16 |
| Documentation . . . . .                              | 17 |
| IAAO Banners & Materials . . . . .                   | 18 |
| IAAO Representatives . . . . .                       | 18 |
| IAAO Executive Officer Travel/Event Request. . . . . | 19 |
| Chapter Bookkeeping . . . . .                        | 19 |
| IAAO Awards . . . . .                                | 20 |
| Contact Information . . . . .                        | 21 |

# Chapter Resource Guide

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## INTRODUCTION

Your chapter plays a vital role in advancing the work of IAAO by assisting with efforts to serve assessment professionals in ways that benefit members in their local area. The success of a chapter relies heavily on its ability to attract and retain members by providing educational content, opportunities for professional and leadership development, networking, and mentorship. This resource guide provides valuable information to spark ideas and develop a plan for organizational success.

## STRATEGIC PLANNING

You and your chapter regularly make numerous, critical decisions that will impact your association over the years. It is important to think about the future. Any journey begins with a destination. It's helpful to know where you want to go and what you wish to accomplish as you begin. The questions below are a springboard to help guide you in strategic planning. It's imperative to ask yourself and your organization the questions of Who, What, Where, When, How, and Why.

1. Who are you? Who are your members?
2. What do you want to accomplish and provide?
3. Where are your members/prospective members?
4. When will you meet?
5. How will you sustain your organization?
6. Why did you form a chapter?

Answering these questions provides a blueprint for goal-setting and strategic planning and makes a big difference in how your chapter operates, the satisfaction of your members, and the effectiveness of meeting the needs of your community. Good organization is an integral building block to fulfilling your mission and vision.

Obviously, there will be short-term, pressing needs that take attention at times. However, it is important for the chapter to always have the long-term in mind so that the mission is not lost as your leaders change.

Resources for strategic planning:

- IAAO Staff, Executive Board, and other IAAO Chapter leaders
- IAAO President's Leadership Symposium
- ASAE>Resources>Leadership>Strategic Planning ([www.asaecenter.org](http://www.asaecenter.org))
- National Council of NonProfits>Tools & Resources>Strategic Planning ([www.councilofnonprofits.org](http://www.councilofnonprofits.org))

## MEMBER RECRUITMENT & RETENTION

Do you know who the best person is to tell assessors or appraisers the many ways they will benefit from being members of an IAAO Chapter? You are! Why?

- Because you know what your colleagues typically do each day
- Because you know what the state demands of them for certification and continuing education
- Because you realize what they are facing economically and politically
- Because you have probably experienced many of the hurdles they are confronting

All of these reasons make you the best person around to let your colleagues know how your chapter and IAAO can assist them with their job and how we can help them keep or improve their position and reputation of the profession.

### Recruitment

IAAO Chapters are responsible for their own membership dues collections, renewal notices, and recruitment efforts.

Here are some things you can do to market your IAAO chapter and recruit members:

- Develop a list of potential new members, such as new assessors, current nonmember assessors/appraisers, legislators involved in tax or assessment legislation, and elected/appointed officials involved in property tax.
- Keep a prospective member list at all times and make contact with the individuals on a regular basis. Make sure to collect all contact information of nonmembers who attend chapter programs/events. Share this list with IAAO Headquarters for additional recruitment support and outreach efforts.
- Personally address mailings to prospective members. This is more effective than sending a blind notice to a company. If a name is not known, send the mailing to a title like “Assessor” or “Appraiser.”
- Encourage members to bring and introduce guests at meetings. Have guest registration forms available to facilitate introductions and augment your prospect list.

- Enlist the support of chapter members to contact potential members by phone or in person.
- Invite potential members to attend your chapter meetings.
- Develop simple guest packets that include information about IAAO, your chapter, and key members they may wish to talk to for information. IAAO is happy to provide membership brochures, applications, and other materials. To request materials, please contact the IAAO Membership Department at [membership@iaao.org](mailto:membership@iaao.org).
- Distribute your business cards to potential members you meet and encourage them to contact you about your IAAO chapter.
- Visit the classroom of all IAAO courses held in your area. (Please contact the instructor first to set up a time for your visit.)

### Retention

- Maintain accurate membership rosters with names, complete contact information, join dates and paid through dates.
- Know your numbers! It is very difficult to know where to focus your efforts if you do not understand how many members have dropped, renewed, or joined in a given period of time.
- Keep meeting attendance records, including members and guests. Contact members who do not attend meetings and follow up with guests to encourage joining. Acknowledge new members and guests at every meeting.
- WELCOME NEW MEMBERS! At their first function, welcome them to the group and ask them to say a few words about themselves and why they joined. Assign them a buddy to help them get to know the ropes and meet other members.
- Encourage your membership committee and board of directors to call members for meetings and special events and to encourage inactive or lapsed members to reactivate.
- Have membership forms available at ALL chapter functions. Better yet, set up a laptop for individuals to join online.
- Make sure you know your members. Are they primarily leaders within the industry, entry level or mid-level? Adjust your programming accordingly to ensure you are providing the most relevant education.

## IAAO EDUCATION

IAAO's Curriculum includes 5-day Courses, 2-3 day Workshops, One Day Forums, Online Offerings and Webinars. You can select the style and duration of the offering based on your particular organizations needs.

### IAAO Courses

IAAO has 15 courses, seven of which are AQB approved by The Appraisal Foundation Course Approval Program. Courses are characterized as 30-hour instructor led classes.

- Course 101 - Fundamentals of Real Property Appraisal
- Course 102 - Income Approach to Valuation
- Course 112 - Income Approach to Valuation II
- Course 201 - Appraisal of Land
- Course 300 - Fundamentals of Mass Appraisal
- Course 311 - Residential Modeling Concepts
- Course 312 - Commercial/Industrial Modeling Concepts
- Course 331 - Mass Appraisal Practices and Procedures
- Course 332 - Modeling Concepts
- Course 333 - Residential Modeling Applications
- Course 400 - Assessment Administration
- Course 402 - Tax Policy
- Course 500 - Assessment of Personal Property
- Course 600 - Principles and Techniques of Cadastral Mapping
- Course 601 - Cadastral Mapping Methods & Applications

### IAAO Workshops

IAAO has 26 workshops, which are 2-3 day in length and instructor led as well.

- Workshop 100 – Understanding Real Property Appraisal
- Workshop 150 – Mathematics for Assessors
- Workshop 151 – Uniform Standards of Professional Appraisal Practice (National)
- Workshop 155 – Depreciation Analysis
- Workshop 157 – The Appraisal Uses of Excel Software
- Workshop 158 – Highest and Best Use
- Workshop 162 – Marshall & Swift Cost Approach (Residential)
- Workshop 163 – Marshall & Swift Cost Approach (Commercial)
- Workshop 171 – IAAO Standards of Professional Practice & Ethics
- Workshop 191 – 7-Hour National USPAP Update
- Workshop 252 – Valuing Property Affected by Environmental Contamination
- Workshop 257 – Fundamentals of Industrial Valuation
- Workshop 260 – Valuation of Agricultural Land
- Workshop 354 – Multiple Regression Analysis for Real Property Valuation
- Workshop 403 – Property Tax Policy Alternatives and Modules
- Workshop 452 – Fundamentals of Assessment Ratio Studies
- Workshop 551 – Valuation of Machinery and Equipment
- Workshop 552 – Basic Personal Property Auditing
- Workshop 553 – Advanced Personal Property Auditing

## IAAO Workshops (*continued*)

Workshop 650 – Cadastral Mapping

Workshop 651 – Geographic Information Systems for Assessors

Workshop 850 – CAE Case Study Review Workshop

Workshop 851 – RES Case Study Review Workshop

Workshop 852 – AAS Case Study Review Workshop

Workshop 854 – CMS Case Problem Review Workshop

## IAAO One Day Forums

One Day Forums are designed to supplement the existing IAAO curriculum as a low cost alternative. At 7.5 hours in length, these forums reduce the time out of the office as well. There are currently 8 One Day Forums.

Forum 909 — The Appraisal of Commercial Properties in a Declining Market

Forum 910 — Valuation of Convenience Stores

Forum 911 — Valuation of Contaminated Properties

Forum 917 — How to Critique An Appraisal

Forum 931 — Reading and Understanding Leases

Forum 932 — Restructuring Income/Expense Statements

Forum 960 — Marshall & Swift Residential – Square Foot Method

Forum 962 — Marshall & Swift Commercial – Square Foot Method

## IAAO On-Line Courses

On-line courses offer a myriad of benefits including convenience, less expensive, no travel time required. IAAO offers a series of on-line courses, the latest addition of which is Course 101 Online.

Online Course 101 - Fundamentals of Real Property Appraisal

Online Workshop 171 – IAAO Standards of Professional Practice and Ethics (Not equivalent to USPAP)

Online Workshop 452 (No Longer Available) – Fundamentals of Assessment Ratio Studies

Online Self-Study 801 – Site Analysis

Online Self-Study 802 – An Introduction to the Cost Approach to Value

Online Self-Study 803 – An Introduction to the Sales Comparison Approach to Value

Online Self-Study 804 – An Introduction to the Income Approach to Value

Online Self-Study 805 – Mass Appraisal of Residential Property

Online Course 808 – Mathematics for Assessors

Online Course 809 – Online Excel Tutorial

Online Course 810 – Understanding Real Property Appraisal

Online Course 811 – Introduction to GIS

Online Course 812 – Advanced Topics in GIS

Online Course 859 – SPSS For Appraisers

Online USPAP – USPAP 7hr USPAP Update provided by McKissock

## Webinars

IAAO’s unique series of Webinars gives you the education you need conveniently and at a reasonable price for any budget. Covering all the hot trends in the tax assessment industry our Webinars will provide you with relevant and timely knowledge for you and your organization. The registration fee is the only cost and by becoming an IAAO member you can take advantage of the IAAO member price.

## Exclusive Webinars offer for IAAO Chapters

IAAO offers all chapters FREE access to our archived webinars. As you plan your upcoming meeting or conference, utilize IAAO’s library of webinars to provide quality educational offerings. Available topics include: Valuation of Hotels, Valuation of Golf Courses, Valuation of Hospitals, Foreclosure Sales and the Mass Appraisal Process, Customer Service and many, many more. Contact [membership@iaao.org](mailto:membership@iaao.org) for more details.

## Educational Offerings for IAAO Chapters

What is the next step if your chapter decides that an IAAO course or workshop will meet your organizations educational needs?

The following matrix, IAAO Educational Offerings, provides you with the three types of offerings, Contract, Certified and IAAO Sponsored as well as a Checklist of responsibilities.

IAAO fills an educational niche for individuals involved with mass appraisal and related disciplines as such we offer programs that are uniquely tailored to the needs of this audience. While other associations offer courses in general appraisal, IAAO offers courses related to mass appraisal. We pride ourselves in being the single source vendor for the mass appraisal/assessment professional.



Certified



Contract



IAAO Conducted

|  |         |         |      |
|--|---------|---------|------|
| Secure and pay for the instructor  | Sponsor | IAAO    | IAAO |
| Secure the classroom facility  | Sponsor | Sponsor | IAAO |
| Handle student registration and payments   | Sponsor | Sponsor | IAAO |
| Provide audio visual equipment   | Sponsor | Sponsor | IAAO |
| Provide course materials (Student Reference Manual, Solutions & Exam)<br><i>Textbooks are optional</i> | IAAO    | IAAO    | IAAO |
| Minimum class size   | N/A     | 25      | 25   |
| Maximum class size   | 50      | 50      | 50   |

Are you interested in obtaining more information on how to schedule your mass appraisal course offering? Contact Jean Spiegel at 800-616-4226.

## IAAO Checklist for Courses & Workshops

Use this checklist to plan your course or workshop

### 6 to 12 weeks prior to offering

- Identify facilities for program
- Identify an instructor
- Determine instructor fee
- Determine lodging needs
- Fill out Program Application prior to program offering and send to IAAO Education Manager
- Send in application for Pre-licensing and/or Continuing Education Approval through state
- Determine registration fee based on site costs, instructor fees, tuition, etc...
- Advertise for program - There is a line item on application that if marked yes will authorize IAAO to advertise the course on IAAO's website and in the monthly F&E publication
- Determine classroom set-up
- Determine instructor A.V. requirements
- Determine student material needs
- Prepare agreements for instructor
- Create confirmation letter for registrants to include: date, time (class and registration) and materials needed for class

### 3 weeks prior to offering

- Contact IAAO to report class size and order course material
- Contact instructor to ensure that all needs are met. Find out their schedule for arrival and departure to and from

### 2 weeks prior to offering

Prepare registration packets:

- Name tags
- Agenda for class
- #2 pencils

### 1 week prior

- Review classroom set-up with facility
- Make necessary transportation arrangement for instructors

### 2-3 Days prior to offering

- Check IAAO course materials to ensure you have what you need

### Evening prior

- Registration
- Check classroom
- Deliver any materials to Instructor

### 1 week after

- Return unused IAAO course materials

### 3 weeks after

- Receive IAAO education invoice and remit payment

### If cancellation is necessary:

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

- Contact IAAO
- Contact instructor
- Contact facility
- Send letters to registrants

## IAAO DESIGNATIONS

An IAAO professional designation is a symbol of knowledge, experience and competence recognized around the globe.

Any professional who aspires to advance their career in appraising, mapping, property assessment and property tax policy at any level - in government or in the private sector - should have an IAAO designation.

Six internationally recognized designations offered by IAAO represent the highest level of achievement in the field: the Certified Assessment Evaluator (CAE), the Residential Evaluation Specialist (RES), the Personal Property Specialist (PPS), the Assessment Administration Specialist (AAS), the Cadastral Mapping Specialist (CMS), and the Mass Appraisal Specialist (MAS).

To earn an IAAO Designation, one must be an IAAO member in good standing and complete the requirements for the particular designation pursued. Each designation has experiential, educational, and examination requirements, including a demonstration project.

Designated members can earn an increase in salary and responsibility. A designation instantly establishes your qualifications and credibility and is a universal, portable measure of your capabilities recognized around the world. Designees report gaining confidence in their abilities and the respect of their peers and those they serve. Earning a designation is a rewarding experience, demonstrating that you have attained the highest level of professionalism.

IAAO Chapters are an ideal place for creating designation study groups (or candidacy clubs) and can provide both mentorship support as well as financial incentives for those who attain designations.

Contact the IAAO Professional Development Department ([education@iaao.org](mailto:education@iaao.org)) with any questions regarding education or designations.

## COMMUNICATION

Make sure you are communicating your goals, plans, and opportunities within the chapter.

Effective forms of communication include:

- Regular meetings
- Emails
- Listserv
- Website
- Facebook, Twitter, LinkedIn, Instagram
- Posting meeting minutes
- Surveying your members
- Making phone calls to prospective members or new hires in assessment offices

IAAO Staff and leaders of successful chapters can offer advice on these items if you need.

## TEAM BUILDING

Get to know each other and have fun! Everyone knows the importance of setting goals and that you have to have a plan to achieve those goals, but building relationships is just as important.

- Create opportunities for your members to get to know one another.
- Use some ice breakers that help members learn about each other's interests (share something unusual thing about yourself, a favorite vacation spot, an interesting hobby).
- Plan occasional social events like bowling, a hike, sporting event or trivia night.
- Plan a group activity like volunteering together.

## MEETINGS

Chapter meetings are a key component of completing the work of the chapter and the organization. Make sure your chapter has regularly scheduled meetings. This sounds very basic, but it is critical to making your chapter functional and successful!

Tips for a successful chapter meeting:

- Schedule meetings in a centralized location or online to accommodate time and travel restrictions.
- Consider Skype, conference line, Google Hangouts, etc. as options for people to participate remotely.
- Have an agenda put together before the meeting.
- Keep on track and respect people's time.
- Keep track of attendance.
- At the beginning of each event, set aside a brief amount of time to discuss the benefits of membership and highlight accomplishments of your chapter.
- Takes minutes and clearly indicate action items.
- Email the minutes to all members afterwards so those who could not attend are kept up to date.
- Bring in a guest speaker or host a relevant webinar.

## DOCUMENTATION

If a tree falls in the forest and no one is there to document it—did it happen? It is vital for your chapter's long-term sustainability to clearly and frequently document what your chapter is doing, how it's doing it, and why it's doing it. Too often a new chapter president or other chapter leader will be left with minimal information and have to spend valuable time reinventing the wheel for the chapter. Documentation is history.

What to document:

- Processes, procedures, and decisions
- Minutes from meetings
- Strategies or plans for events, fundraisers, and PR campaigns
- Contacts with donors, mentors, and other supporters of your chapter so you can keep them up-to-date on your chapter and programs and maintain a long-term relationship
- All program and project-related items
- Contacts and correspondence
- Anything that will have to be replicated or repeated in the future
- Share your pictures with IAAO and post to social media

Where to document:

- Use Google docs, Dropbox, Zoho, or other online, free to low-cost document storage.
- Back up documentation on flash drives.
- Provide back-up files and make sure other members of the chapter know how to access online and stored files.
- Membership, prospects, and meeting attendees can be kept in an excel spreadsheet or by using a free/low-cost database.

If your chapter would like to share a process or best practice, please email your idea and chapter name to [membership@iaao.org](mailto:membership@iaao.org).

## IAAO BANNERS & MATERIALS

IAAO display materials are available to use at meetings to promote IAAO programs and are available free to chapters on a first-come, first-served basis. We recommend that you procure a table to display IAAO materials along with an IAAO banner. Please return the banner to IAAO via UPS ground; a return shipping document will be included in the banner case for easy return. Also available at no cost are IAAO brochures and promotional gifts for meeting guests. To reserve a banner or request materials, e-mail or call membership at 816-701-8105 six weeks prior to your meeting.

## IAAO REPRESENTATIVES

Who are IAAO Representatives?

IAAO Representatives (Reps) are the local liaisons to IAAO Headquarters. They have two major areas of responsibility: communication and marketing.

IAAO Reps inform headquarters about local chapter events, meetings, educational needs, legislative initiatives and changes, personnel changes, new officers of local organizations, retirements, and similar activities.

Conversely, Reps communicate to the chapter the happenings at headquarters.

As IAAO's marketing force, Reps promote membership, professionalism, and the designation programs. They have access to displays and materials for chapter meetings, as well as videos and presentations about the profession, and are prepared to give speeches to promote IAAO's goals and mission.

How are IAAO Reps selected?

The chapter or the IAAO President appoints all Reps for a two-year term.

Representatives are appointed for each state, Canadian province, and country other than the United States and Canada. In addition, each state, province, and country is part of a geographic region with a Regional IAAO Rep. Each chapter can appoint up to four Reps.

What can an IAAO Rep do for the chapter?

Your Rep can help you schedule education, write a column for your newsletter, promote IAAO at your meetings, and ultimately help you communicate with headquarters.

## IAAO EXECUTIVE OFFICER TRAVEL/EVENT REQUEST

IAAO Executive Officers/Staff are available to speak at your events. The IAAO officer travel schedule is established early in the year and the budget for travel is limited. It is important to make your request early to avoid scheduling conflicts. Every attempt is made to accommodate requests, but sometimes it is not possible to do so. As a general rule, IAAO will pay for the roundtrip airfare and expenses up to the officer's arrival at your event. It is requested that ground transportation for arrival and departure, hotel accommodations and registration be paid by the sponsoring organization. In the event this would be a hardship for your organization, please notify IAAO. If your chapter would like to have an IAAO Executive Officer speak at an event, please submit a request using the Officer/Travel Event Information Form on the IAAO website.

## CHAPTER BOOKKEEPING

If your chapter hasn't already done so, contact the Internal Revenue Service (IRS) for an Application for Employer Identification Number (Form SS-4). If your chapter has not been recognized as a nonprofit organization and exempt from state and federal taxes, you will need to ask the IRS as well as your local state revenue department for the necessary forms to file to receive this status. This will become important as your chapter grows and builds a fund balance large enough to draw the attention of the state and federal government; it is better to have the necessary documentation on hand than to attempt to get it after your organization's tax status is challenged.

Keep and track all receipts for the organization. This ensures that you have an accurate record of all funds received and provides the documentation members may need for reimbursement of educational and professional dues expenses for tax purposes. Keep receipts simple--remember that a receipt will be used by you, whoever audits the records, and possibly by a member seeking reimbursement. Indicate how much was received and for what purpose.

It will be extremely helpful to both you and the chapter if all funds flow directly to the treasurer.

A good spreadsheet or database program (like Quickbooks) can also be helpful in keeping track of membership payments.

The IAAO Comptroller and other chapter leaders can be a good resource if you have questions managing finances and tax status.

# IAAO AWARDS

IAAO takes great pride in recognizing individual and organizational achievements in the assessment industry. Through IAAO’s Annual Awards Program, both members and nonmembers can receive international recognition for excellence in property appraisal, assessment administration, property tax policy and related disciplines.

The IAAO Annual Awards Program boasts 21 award categories recognizing individual and organizational achievements in several areas, including publications, technical expertise, and service to IAAO, just to name a few. A call for nominations is made in the first quarter of each year and award recipients are recognized at the IAAO Annual Conference.

The awards program is a highly visible even for IAAO members, and members and Affiliated organizations are encouraged to submit nominations. The individual award categories are described on the IAAO website, along with stated award criteria. Unless otherwise indicated, all award categories are judged by the IAAO Member Recognition Committee. All award recipients receive a plaque award and recognition at the annual conference.

There are several award categories specifically geared toward chapters. You are encouraged to submit nominations to gain international recognition for your hard work.

In addition, you probably have chapter members deserving of individual awards. Don’t hesitate to nominate them to honor their achievements.



## IAAO CONTACT INFORMATION

|                            |              |                              |              |
|----------------------------|--------------|------------------------------|--------------|
| Accounting . . . . .       | 816-701-8155 | Library & Research . . . . . | 816-701-8117 |
| Communications . . . . .   | 816-701-8141 | Meetings & Events . . . . .  | 816-701-8109 |
| Designations . . . . .     | 816-701-8137 | Membership . . . . .         | 816-701-8132 |
| Exams & Records . . . . .  | 816-701-8136 | Marketing . . . . .          | 816-701-8126 |
| Executive Office . . . . . | 816-701-8112 | Technology . . . . .         | 816-701-8122 |

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# INTERNATIONAL ASSOCIATION of **ASSESSING OFFICERS**

**WE** are a professional membership organization of government assessment officials and others interested in the administration of the property tax. We were founded in 1934, and we have more than 7,000 members worldwide from governmental, business, and academic communities.

**WE** are the internationally recognized leader and preeminent source for innovation, education, and research in property appraisal, assessment administration and property tax policy.

**WE** are IAAO, and **WE** value the world!



**IAAO**

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