TABLE OF CONTENTS

INTRODUCTION ................................................................................................................................. 4

ABOUT IAAO ....................................................................................................................................... 4

STRUCTURE ......................................................................................................................................... 4
EXECUTIVE BOARD ............................................................................................................................. 4
PROFESSIONAL DEVELOPMENT COMMITTEE .................................................................................. 5
INSTRUCTOR RELATIONS SUB-COMMITTEE .................................................................................... 5
HEADQUARTERS’ STAFF ..................................................................................................................... 6
Departments ........................................................................................................................................ 6

PROFESSIONAL DEVELOPMENT DEPARTMENT ................................................................................. 7

EDUCATION SERVICES ....................................................................................................................... 7
Curriculum Development ..................................................................................................................... 7
State Appraisal Certification/Licensure .................................................................................................. 7
Special Examinations ............................................................................................................................ 7
Self Study Curriculum .......................................................................................................................... 7
Certificate of Educational Recognition ................................................................................................. 8
Timothy N. Hagemann Memorial Membership Trust ........................................................................... 8

PROFESSIONAL DESIGNATION PROGRAM SERVICES .................................................................. 9
Candidacy/Designation Program ............................................................................................................ 10
Jeff Hunt, CAE, Memorial Candidates Assistance Trust ........................................................................ 9
Professional Designation Advisors (PDAs) ............................................................................................ 9

PUBLICATIONS .............................................................................................................................. 9

BECOMING AN IAAO INSTRUCTOR .................................................................................................. 10

APPLICATION PROCEDURES ............................................................................................................. 10
Instructor Criteria as Approved by Executive Board ............................................................................. 10

SELECTION .......................................................................................................................................... 10

QUALIFICATIONS .................................................................................................................................. 11

CONDUCT ............................................................................................................................................ 13

MAINTAINING INSTRUCTOR STATUS .................................................................................................. 13

EVALUATIONS ....................................................................................................................................... 15

HONORARIUMS ................................................................................................................................. 17

INSTRUCTOR EVALUATION WORKSHOP ......................................................................................... 17

TRAINEE ASSIGNMENTS ....................................................................................................................... 18

INSTRUCTOR ASSIGNMENTS ............................................................................................................ 19

ASSIGNMENT TO IAAO-CONDUCTED PROGRAMS .................................................................... 19
ASSIGNMENT TO CONTRACT PROGRAMS ......................................................................................... 20
ASSIGNMENT TO CERTIFIED PROGRAMS ......................................................................................... 20
CANCELLATION OF ASSIGNMENT ................................................................................................. 21

EDUCATION CALENDAR .................................................................................................................. 21

COURSE SIZE ...................................................................................................................................... 21

INSTRUCTOR PREPARATION .............................................................................................................. 22

KNOWLEDGE OF IAAO CURRICULUM .............................................................................................. 22
STUDENT REFERENCE MANUALS ...................................................................................................... 22
INSTRUCTOR TRAINING MANUALS ..................................................................................................... 22
IAAO COURSE MATERIALS ................................................................................................................ 22
COURSE AUDITING .......................................................................................................................... 22

REPRESENTING IAAO ...................................................................................................................... 23

PROFESSIONAL CONDUCT ............................................................................................................... 23
ON-SITE ADMINISTRATION

ADMINISTRATION
IAAO Instructors Must:
IAAO Instructors Are Not Responsible For:
IAAO Instructors Must Not:

CLASSROOM
Instructional Hours
Study Periods

DISTRIBUTION OF MATERIALS

STUDENT REFERENCE MANUALS

TEXTBOOKS
Property Assessment Valuation, 3rd edition, 2010
Property Assessment Valuation, 2nd edition, 1996
Assessment Administration, 2003
Fundamentals of Mass Appraisal, 2011
Fundamentals of Tax Policy, 2008

ADDITIONAL MATERIALS AVAILABLE
Maps
Mapping Tool Kit
Supplies

EXAM/EVALUATION PACKET (EEP)

EXAMINATION SECURITY FORMS
FINAL EXAMINATIONS
REQUESTS FOR MANUAL GRADING
IAAO POLICY STATEMENT ON CHEATING
RULES FOR PROCTORING AN EXAMINATION
LOGISTICAL REPORT / INSTRUCTOR COMMENT REPORT FORMS
ATTENDANCE SHEETS
EDUCATION RECORD SCANNER FORMS
UNIFORM REQUEST FOR RE-CERTIFICATION CREDIT FORMS
INSTRUCTOR EVALUATION FORMS
RETURNING THE EXAM/EVALUATION PACKET (EEP)

STUDENT INFORMATION
Examination Processing
Examination Report and Certificates
IAAO Recertification Credit
State Appraisal Board Licensing/Continuing Education Credit

INSTRUCTOR INFORMATION
Honorarium
Expense Reimbursement
Instructor Evaluation Summary Report
Class List

STAFF DIRECTORY

ATTACHMENTS
Introduction

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

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

About IAAO

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

The mission of IAAO is a global community of mass appraisal experts who promote excellence in property appraisal, assessment administration and property tax policy through professional development, research and standards.

It is the vision of IAAO to be the global leader and preeminent source of standards, professional development and research in property appraisal, assessment administration and property tax policy.

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

Structure

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

Executive Board

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

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

**Professional Development Committee**

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

**Instructor Relations Sub-Committee**

I. **Purpose:**

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

II. **Responsibilities:**

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

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

III. **Members:**

Six regular members (one appointed subcommittee Chair) to include: Three must be either senior or specialty instructors. Three must be education coordinator/sponsors.

IV. **Chair Responsibilities:**

The chair of the sub-committee is responsible for leading and coordinating the committee work and represents the committee to the Executive Board as requested. The committee chair should coordinate with the chair of the Professional Development Committee any changes that may affect Education or Professional Designation. The sub-committee chair should be present at the committee meeting when practical to lead and guide. The sub-committee chair should act as counsel to resolve conflicts and facilitate decision-making.

V. **Reporting Contact:**

The sub-committee chair to report directly to the Executive Board.

VI. **Products**

List of Instructors Annual Summary Report
Headquarters Staff
The Association’s Executive Director directs the staff at its headquarters located in Kansas City, MO. The Executive Director is responsible for the general day-to-day administration of affairs of the Association.

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

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

III. Publications:
   This department is responsible for all IAAO publications except course manuals and marketing materials. The department solicits content for publications, edits and writes content, does layout, design, and photography, and works with printers to produce and distributes final products. This department is responsible for the publication of Fair & Equitable magazine, the Journal of Property Tax Assessment & Administration and IAAO books.

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

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

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

Education Services

Curriculum Development
IAAO offers approximately sixteen courses. These five-day courses consist of thirty instruction hours, exclusive of the final examination. Although the structure of each course varies, depending on the nature of the material covered, most courses are lecture-discussion type, relying heavily on problem solving work. Examinations are available for each course. They are not mandatory but highly recommended, as many students may need the examination score to receive continuing education credit from their state appraisal boards or appraisal/assessor associations.

The IAAO workshop series consists of two to three day programs. These workshops offer a variety of presentations on specific assessment issues. Exams are offered for the majority of the workshops, but they are not mandatory. IAAO also has a series of one-day forums that are not tested.

A specific number of re-certification credit hours are granted to IAAO designees who attend IAAO courses and workshops. (See attachment 1 – IAAO Curriculum Listing)

Questions regarding curriculum can be directed to the Director of Professional Development.

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

Special Examinations
There are two types of special examinations
I. Challenge (credit by examination):
   Applicants wishing to challenge an IAAO examination without having taken the course, students who withdrew from a course, and students who deferred examination upon completion of a course are eligible under the Challenge category.

II. Re-examination (failure of examination):
   Any student who fails an examination of an IAAO course is eligible under the Re-examination category. Special examination applications are automatically sent to students failing an IAAO course. The student has only one calendar year from the original exam date in which to take the re-exam. If the re-examination has not been attempted within the ensuing 12 months, the student will be required to retake the course.

Interested persons may request a special examination application from the Education Manager or via the Internet by visiting our website at IAAO.org.

Self-Study Curriculum
Self-Study Curriculum allows students to learn at their own pace and schedule. Beginning with basic concepts, self-study instruction gradually guides students through the more complex aspects of a subject by presenting material in a series of carefully planned steps. These programs include Site Analysis and Evaluation, Sales Comparison Approach to Value, Cost Approach to Value, Income Approach to Value, and Mass Appraisal of Residential Property.
Information about these courses is available from the Professional Development Department or via the Internet by visiting our website at IAAO.org.

**Certificate of Educational Recognition**

IAAO members wishing to receive special recognition for their education achievements may apply to receive the Certificate of Educational Recognition. The certificate requires that student’s successfully complete IAAO course 101, 102, 151 or another national USPAP 15-hour course and two additional five-day IAAO courses, and remit a $25 processing fee with an application.

The certificate program creates a uniform international standard that can be used by jurisdictions to qualify candidates for professional positions. The credential may be carried from one jurisdiction, state, province, or nation to another.

Questions regarding the Certificate of Educational Recognition may be directed to the Education Manager.

**Timothy N. Hageman Memorial Membership Trust**

This trust was created in 1993 to help deserving individuals, especially from rural areas, in becoming members of IAAO, gain professionalism with grants for costs associated with taking an IAAO educational course, to support research projects for issues important to rural appraisers and to assist in attending an IAAO conference.

Scholarships are awarded throughout the year on a financial need basis. The number of awards depends on the amount of funds available.

IAAO members interested in applying for a Hageman Trust Grant may request an application from the Human Resource and Administration Manager or from the IAAO website.
Professional Designation Program (PDP) Services
The fair and equitable assessment of property for tax purposes requires a high level of mass appraisal skills to determine estimates of value, as well as single property appraisal skills for defending assessments before tribunals and reviewing authorities. IAAO has developed and implemented a program of professional designations intended to increase the professional competence of assessment personnel through education.

The objectives of IAAO’s professional designation program are to raise the standards of the profession; to attain recognition of the assessment profession by government authorities and the public; and to gain for designated members’ recognition as qualified, objective, and unbiased appraisers and administrators of systems for ad-valorem tax purposes.

In 1953, IAAO created the professional designation Certified Assessment Evaluator (CAE). The CAE is designed for individuals who attain professional-level skills in single property appraisals, mass appraisals, and assessment administration.

Following the development of the CAE, the IAAO developed the professional designations Residential Evaluation Specialist (RES) in 1978, Cadastral Mapping Specialist (CMS) in 1989, Personal Property Specialist (PPS) in 1991, and the Assessment Administration Specialist (AAS) in 1995.

Candidacy/Designation Program
Any member of IAAO can apply for candidacy for any designation in the PDP. 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.

Jeff Hunt, CAE, Memorial Candidates Assistance Trust
This trust was established to aid candidates in completing the requirements of the Professional Designation Program. The trust awards grants on the basis of need for such items as report grading fees, examination fees, and attendance at required courses.

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

Publications
To assist candidates working on their demonstration appraisal reports, IAAO has several publications available. The Guide to Real Property Demonstration Appraisal Report Writing and the Guide to Personal Property Demonstration Appraisal Report Writing are designed to assist candidates in writing high-quality demonstration reports. The Professional Designations Subcommittee has adopted them as the subcommittee’s official guidelines for report grading. IAAO also provides access to a formatted file for the residential demonstration appraisal report on the IAAO website.

Questions regarding the Professional Designation Program can be directed to the Professional Designation Program Manager.
Becoming an IAAO Instructor

Application Procedures

Instructor Criteria as Approved by Executive Board

The Criteria for Instructor Selection, Qualifications, Evaluations and Conduct Guidelines (See attachment 2 – Criteria for Instructors) states the qualifications for instructors of IAAO courses and workshops.

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

I. Selection:

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

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

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

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

One year of appraisal experience is defined as:

- A calendar year where the individual spent a majority (more than 50%) of their professional time appraising real property, personal property, or businesses and
- Derived a significant portion of their income from performing (real property, personal property, or business valuation) appraisal services.
One year of specialty experience is defined as:

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

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

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

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

II. Qualifications:

The following will constitute the progression of IAAO instructors:

A. Trainee - a trainee instructor will have successfully completed an IAAO IEW. All trainee assignments must be arranged by IAAO staff. Upon acceptance of the applicant by the Instructor Relations sub-committee, the trainee instructor must teach his/her first course on a course from the tract taken at the IEW with an approved IAAO senior instructor or senior specialty, as appropriate, if they want to instruct nationally. The trainee will be expected to teach approximately 10 hours of a course; however, no trainee will be allowed to teach on the afternoon of the day preceding the exam. The senior instructor will rate the trainee on his/her performance during the training assignment and furnish an evaluation report to the Instructor Relations Sub-Committee. Upon review of the evaluation by the Instructor Relations Sub-Committee the trainee may be granted regular instructor status. No trainee will be granted regular instructor status that has not met the following requirements.
   1. Successful completion of an IEW, and
   2. Passed a training assignment under a senior or senior specialty instructor, in a state/province other than the state/province of residence of the trainee, and
   3. A candidate for an IAAO designation (If the trainee does not obtain a designation within two (2) years, they will be suspended, and may only instruct as an In-State instructor until they obtain their designation.)
   4. Be an IAAO member in good standing

B. In-State Instructors - are limited to teaching within their state/province, and will have met the following requirements:
   1. Successful completion of an IEW*
   2. Successfully completed (attended at least 50 minutes of each 60 minutes of instruction and passed the final examination) or served as either author or reviewer of the IAAO Course or Workshop they wish to instruct. Equivalent education and examination challenges do not substitute for this requirement.*
3. Be an IAAO member in good standing

* In-State instructors will be required to prove requirements 1 and 2 listed above with every application to instruct a course/workshop. In-State instructors may only instruct IAAO programs that are conducted on a "certified" basis.

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

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

D. Specialty Instructor – a specialty instructor will have met the requirements for a regular instructor and additionally meet the following requirements:
1. Hold an AAS, CMS, PPS or RES designation
2. Be an IAAO member in good standing

There will be four classes of specialty instructors:
   a) AAS Designee will be called an Assessment Administration Instructor: Eligible to teach Course 400 and 402 and any Assessment Administration workshops, such as 403 and 452.
   b) CMS Designee will be called a Mapping Instructor: Eligible to teach any Mapping courses and workshops. Courses 600 & 601 and Workshops 650 & 651.
   c) PPS Designee will be called a Personal Property Instructor: Eligible to teach all Personal Property courses and workshops. Course 500 and Workshops 551, 552 and 553.
   d) RES Designee will be called a Residential Instructor: Eligible to teach Courses 101, 102, 201 and Workshops 100, 155 and 252.

E. Senior Specialty Instructor - a senior specialty instructor will have met the requirements for a regular instructor and additionally meet the following requirements:
1. Hold an AAS, CMS, PPS or RES designation
2. Have completed three teaching assignments as a regular instructor
3. Be an IAAO member in good standing

There will be four classes of senior specialty instructors:
   a) AAS Designee will be called a Senior Assessment Administration Instructor: Eligible to teach Course 400 and 402 and any Assessment Administration workshops, such as 403 and 452.
b) CMS Designee will be called a Senior Mapping Instructor: Eligible to teach any Mapping courses and workshops. Courses 600 & 601 and Workshops 650 & 651.

c) PPS Designee will be called a Senior Personal Property Instructor: Eligible to teach all Personal Property courses and workshops. Course 500 and Workshops 551, 552 and 553.

d) RES Designee will be called a Senior Residential Instructor: Eligible to teach Courses 101, 102, 201 and Workshops 100, 155 and 252.

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

F. Senior Instructor—a senior instructor will have met the requirements for a regular instructor and additionally meet the following requirements:
1. Hold a CAE designation
2. Have completed three teaching assignments as a regular instructor

III. Conduct:

A. During teaching assignments, instructors must conduct themselves with integrity. They should maintain an appropriate professional relationship with students attending IAAO courses, both in and outside the classroom.

B. It is the policy of IAAO to promote a positive learning environment for all students. Harassment and/or discriminatory behavior directed toward a person because of his or her race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information is expressly prohibited. Instructors are obligated to refrain from such behavior and are required to discourage such behavior from occurring in the classroom by others.

C. While in the classroom, only IAAO approved material should be discussed.

D. Instructors wishing to set up special sessions for review should do so only in a public classroom or public meeting room.

IV. Maintaining Instructor Status

A. All All instructors, including in-state, regular, senior, & senior specialty instructors, must maintain their IAAO membership in good standing. If an instructor does not meet this requirement, they must pay one year in arrear and current calendar year to meet membership requirement. If they would like to take a training assignment, they must wait the current year before they can accept the assignment.

B. All national instructors, regular, senior, & senior specialty instructors, must maintain their IAAO designation.

C. All instructors, including in-state, regular, senior, & senior specialty instructors, must instruct an IAAO course/workshop/One Day Forum* at least once in a period of three consecutive years. If an instructor does not meet this “three consecutive years” requirement, they will be removed as an active instructor until which time they attend and pass another IEW, in its entirety. *For One Day Forum (ODF) instruction, the instructor must distribute IAAO’s
evaluation form and provide the completed evaluations to IAAO Headquarters, Professional Development.

D. All instructors, including in-state, regular, senior, & senior specialty instructors, are required to attend an Instructor Meeting at the annual conference or participate in an Instructor Meeting Webinar at least once every three years. All instructors, including in-state, regular, senior, & senior specialty instructors, are required to attend an Instructor Meeting at the annual conference or participate in an Instructor Meeting Webinar at least once every three years. If an instructor does not meet this requirement, they must review the recording of the previous year’s instructor meeting and also attend the current year’s meeting before they will be added to the active instructor list.

E. There is no tenure for IAAO instructors. Reappointment depends on continued good teaching in the classroom and good standing with IAAO

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

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

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

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

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

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

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

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

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

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

V. Evaluations

The Director of Professional Development shall review all instructors annually.

A. The IAAO Procedural Rules require that the Instructor Relations Sub-Committee train, coordinate, and monitor the quality of the instructor cadre. This “monitoring” takes place in the form of an annual overall performance rating.

B. The Instructor Relations Sub-Committee has determined that all instructors will be evaluated based upon their student evaluations and pass rates in relation to the National Course Average. The normal acceptable range is determined by using +/- 1.5 standard deviation from the National Course Average. Any significant comments brought to the attention of the Professional Development Department staff from students, Education Coordinators and/or instructors will be included in the evaluation. By highlighting these comments we encourage the instructor to take appropriate action to remedy any problems.

C. The Instructor Relations Sub-Committee may conduct evaluations, other than annually, in response to complaint(s) on an instructor. Before an evaluation is conducted, the Instructor Relations Sub-Committee will review the complaint(s) and determine if the complaint(s) merits any further review.
D. If the Instructor Relations Sub-Committee does an evaluation resulting from a complaint(s), the following guidelines will be used:

1. Instructor Relations Sub-Committee may conduct a conference call with the complainant(s) or conduct a follow-up by written correspondence to confirm the details of the complaint(s).

2. The Instructor Relations Sub-Committee may conduct telephone interviews from randomly selected participants in the course/workshop relating to the complaint(s).

3. The Instructor may be sent a written copy of the complaint(s) but names of the complainant(s) will be omitted. The instructor will have ten (10) days to respond back to the Instructor Relations Sub-Committee or request a conference call with the committee.

4. The committee may review all the information and can take one of the following actions with the complainant(s) and instructor being notified in writing.
   a) No action needed.
   b) Written reprimand to the instructor. This would be a result of an improper action, not following IAAO policies and procedures, etc. The reprimand would be placed in the instructors file.
   c) Written reprimand and require the instructor to recertify by attending an IEW before instructing again.
   d) Instructors with significant problems may be asked to meet or can request to meet with a review committee comprised of the Chair of the Instructor Relations Sub-Committee and at least two Senior Instructors not currently on the IRSC. Failure of the instructor to follow any actions by the Instructor Relations Sub-Committee or the review committee could result in the removal of instructor status.
   e) The Instructor Relations Sub-Committee (IRSC) shall appoint an education counseling subcommittee composed of at least two senior instructors that are not currently on the committee and the chair of the IRSC.

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

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

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

H. The IAAO Instructor Relations Sub-Committee shall review existing guidelines biennially. The guidelines should include provisions for an annual review of the instructor evaluation process.
I. This model for ongoing instructor evaluation and review is not to be construed to limit the "on the spot" immediate action of the Director of Professional Development or Instructor Relations Sub-Committee to prevent damage to the integrity or reputation of the IAAO education system.

VI. Honorariums

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

Flat fee for Senior Instructors:
- $1,500 – One-Day Forum/Workshop
- $2,350 – Two-Day Workshop
- $2,750 – Two ½-Days Workshop
- $3,050 – Three-Day Workshop
- $3,800 – Four-Day Workshop
- $4,250 – Five-Day Course

Flat fee for Regular Instructors:
- $1,150 – One-Day Forum/Workshop
- $1,900 – Two-Day Workshop
- $2,000 – Two ½-Days Workshop
- $2,350 – Three-Day Workshop
- $2,650 – Four-Day Workshop
- $3,200 – Five-Day Course

Expense Reimbursement

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

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

During this 3-day workshop, students learn about IAAO education delivery, adult education, effective communication, and IAAO curriculum. Each student is expected to understand the general subject matter and specific course material, spend at least 20 hours in advance preparation, prepare short practice presentations, and prepare one final ten-minute presentation. Students demonstrate (and are evaluated on) their teaching style, classroom presence, familiarity and comprehension of the course material, organization of subject matter, and clarity and accuracy of their classroom presentation.

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

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

<table>
<thead>
<tr>
<th>Session</th>
<th>Courses/Workshops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course 101</td>
<td>101,102, 201,100,155</td>
</tr>
</tbody>
</table>
Trainee Assignments

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

The Trainee will receive an Instructor Trainee Comment Form (see attachment 3 – Instructor Trainee Comment Form) from IAAO. This form will be used for comments about their teaching experience. The Senior Instructor will function as an instructor of the Trainee and as an evaluator. The Senior Instructor will complete a Trainee Evaluation Form (see attachment 4 – Trainee Evaluation Form). Specific information about the Trainee and about the procedures for overseeing and evaluating the Trainee will be given to the Senior Instructor prior to the course. Trainees do not receive an honorarium however; travel, hotel and food will be reimbursed by IAAO if the trainee assignment is completed within 3 years of their initial IEW completion. The maximum expense reimbursement is $1,000 and subject to IAAO Expense Reimbursement policy.
Instructor Assignments

The IAAO Professional Development Department staff is responsible for assigning IAAO instructors to Contract and IAAO-Conducted courses and workshops. This is done initially by email, followed by a written confirmation letter. Only IAAO staff may make instructor assignments. The sponsor of certified programs is responsible for selecting the IAAO approved instructor.

On occasion, an agency may directly ask an instructor to teach at its IAAO program. Unless this is for a certified program, the instructor should refer all such requests to the IAAO Professional Development Department. All Certified program negotiations concerning salary and expense reimbursement should be carried out between the instructor and the contracting agency.

The confirmation letter from IAAO confirms the teaching assignment and provides the following information: last revision dates of the Student Reference Manual (SRM) and Instructor Manual (IM), program to be taught, dates and location of program, location of classroom facilities and name and address of the local coordinator. (See attachment 5 – Instructor Assignment Confirmation Letter)

Instructors should indicate by phone or in writing if a new SRM or IM is needed. Requests for additional copies of SRM’s are available for a cost. (See attachment 6 – Memo on SRM). Instructors should sign and return a copy of the confirmation letter to IAAO. A copy should be kept for your information. Instructors receiving the Contract for Teaching Assignment from IAAO should sign and return the form to IAAO. A countersigned copy will be forwarded to you. (See attachment 7 – Contract for Teaching Assignment)

Assignment to IAAO-Conducted Programs

IAAO is responsible for promotion, student registration, on-site distribution of materials, classroom facilities, audiovisual equipment, preparation and shipment of materials, instructor selection, honorarium, exam processing, and student record maintenance.

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

IAAO Senior Instructors receive preference when making assignments. Using an alphabetical list, instructors who are approved to teach the upcoming program, the Education Manager will contact the first name on the list and offer him/her the teaching assignment. If the instructor refuses the assignment, the next instructor is called and the first instructor is moved to the bottom of the list. The process is repeated until an instructor accepts the assignment. The next time an instructor is needed for this particular program, the name after the person accepting the last assignment is called. The process is repeated as stated above.

If State Appraiser Certification and Licensure Boards require licensed/certified instructors, assignments are made accordingly.

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

Teaching assignments will usually be made 30 or more days before the first day of the program. All assignments are made on the assumption that the instructor will teach one class of 50 or fewer students for 30 instructional course hours or the assigned number of workshop hours and proctor the final examination.
Assignment to Contract Programs
IAAO is responsible for preparing and shipping materials, instructor selection and honorarium, exam processing, and student record maintenance. The sponsoring agency is responsible for promotion, student registration, collection of fees, on-site distribution of materials, classroom facilities, and audiovisual equipment. Contract Courses have a minimum enrollment requirement of 25.

IAAO will arrange for an instructor for each course specified in the signed Contract program agreement. IAAO will attempt to honor requests from the sponsor for specific instructors, subject to availability. However, IAAO reserves the right to assign any IAAO-approved instructor to a program. If the instructor originally assigned must cancel, IAAO will assign a substitute.

IAAO Senior Instructors receive preference when making assignments. Using an alphabetical list, instructors who are approved to teach the upcoming program, the Education Manager will contact the first name on the list and offer him/her the teaching assignment. If the instructor refuses the assignment, the next instructor is contacted and the first instructor is moved to the bottom of the list. The process is repeated until an instructor accepts the assignment. The next time an instructor is needed for this particular program, the name after the person accepting the last assignment is called. The process is repeated as stated above.

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

If the agency indicates that the anticipated enrollment in a program is more than 50, IAAO may assign a second instructor to split the program into two classes.

Only the IAAO Professional Development Department may assign instructors for Contract programs. No agreement entered into between the agency and an IAAO instructor regarding assignments shall be binding to IAAO.

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

Teaching assignments will usually be made 30 or more days before the first day of the program. All assignments are made on the assumption that the instructor will teach one class of 50 or fewer students for 30 instructional course hours or the assigned number of workshop hours and proctor the final examination.

Assignment to Certified Programs
IAAO is responsible for preparing and shipping materials to the Education Coordinator, exam processing, and student record maintenance. The sponsoring agency (not IAAO) is responsible for selecting an IAAO approved instructor, instructor honorarium, as well as promotion, student registration, collection of fees, on-site distribution of materials, classroom facilities, and audiovisual equipment. Only instructors approved by IAAO may teach IAAO Certified programs. These programs have no minimum enrollment requirement but are limited to a maximum of 50 students per class.

The sponsoring agency is responsible for assigning the instructor. No more than two instructors may teach one class. The instructor(s) must be on the list of IAAO approved instructors.

The instructor and IAAO are responsible for examination procedures; the agency is responsible for proper delivery of the program.

The sponsoring agency will pay the instructor.
The sponsoring agency will keep in contact with the instructor as to the logistics of the program.

**Cancellation of Assignment**

I. By IAAO:
   On occasion, IAAO must cancel a program because of insufficient enrollment. If this occurs, IAAO will cancel the teaching assignment and notify the instructor no fewer than ten (10) business days before the program.

II. By Instructor:
   Instructors unable to fulfill assignments should immediately notify the IAAO Professional Development Department and, if appropriate, the local Education Coordinator.

III. By Education Coordinator (Local Sponsor):
   Coordinators must let IAAO know at least two weeks (ten business days) before the start of the class if they intend to cancel. All cancellations should be put in writing and mailed or faxed to IAAO’s Education Manager.

**Education Calendar**

IAAO publishes an education calendar in the IAAO Fair and Equitable and on the IAAO website http://www.iaao.org. Education Coordinators have the option of having their program listed in these publications assuming they give IAAO proper notice. Some coordinators choose not to have their program listed because they wish to limit the enrollment.

**Course Size**

The IAAO Professional Development Committee has stipulated that no class should exceed 50 students. An agency must inform IAAO if a class is to exceed 50, the Professional Development will assist the agency with course options. Multiple instructors may not teach a class unless the arrangement has been approved by IAAO.
Instructor Preparation

Knowledge of IAAO Curriculum
The education activities of the IAAO reflect the Association’s conviction that basic appraisal, mass appraisal, and administrative skills are crucial for the successful functioning of the property tax professional.

The Professional Development Department has the responsibility of creating materials for courses, workshops, seminars, program courses, and other educational projects.

Student Reference Manuals
IAAO will provide each student with a Student Reference Manual (SRM) in a three-ring binder. In the manual, students will find an introductory page, IAAO Code of Ethics and Professional Conduct, a summary of the USPAP, a course schedule, assigned readings and the student program material.

Instructor Training Manuals
Instructor Manuals (IM’s) are available for most IAAO courses and workshops. You may contact the Education Manager to inquire about the availability of an instructor manual for a particular course or workshop. The Appraisal Foundation has an instructor manual available for approved Uniform Standards of Professional Appraisal Practice (USPAP) instructors.

Instructor Manuals typically contain a more detailed course outline.

IAAO will provide initial SRM’s and IM’s where applicable, to instructors for each course the instructor has been approved to teach. If you do not have a current Student Reference Manual and are scheduled to teach a course, please let IAAO know and one will be shipped to you. All requests for additional SRM’s/IM’s MUST be approved by the Professional Development Director.

The instructor is responsible for retaining and maintaining all SRM’s and IM’s.

IAAO Course Materials
No instructor may alter or delete any printed course materials provided with an IAAO course. Instructors are strongly encouraged to use power point and other technologies available in the presentation of IAAO materials. Student Reference Manuals contain problems and case studies for classroom instruction. Instructors may provide, at their own expense, additional teaching materials if believed the class would benefit, including extra problems, visual teaching tools and study sessions.

Instructor will assume responsibility for obtaining copyrights or permission to use copyrighted material as additional teaching material. Duplication of all program materials should be done at the IAAO office, not at the school. Only under extenuating circumstances will IAAO permit and assume the cost of duplication at a school.

Course Auditing
There will be no charge for instructors who have already taken and passed the course and are auditing it solely for the purpose of reviewing another instructor’s approach. No continuing education credit will be allowed for auditing a course.
Representing IAAO

Professional Conduct
In many cases, IAAO instructors are the only face-to-face contact students have with IAAO. IAAO instructors should exhibit the highest standard of personal and professional demeanor at all times. The Professional Development Committee has adopted the following guidelines for instructors.

I. During a teaching assignment, instructors must conduct themselves with integrity. They should maintain an appropriate professional relationship with IAAO students, both in and outside the classroom.

II. It is the policy of IAAO to promote a positive learning environment for all students. Harassment and/or discriminatory behavior directed toward a person because of his or her race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information is expressly prohibited. Instructors are obligated to refrain from such behavior and are required to discourage such behavior from occurring in the classroom by others.

III. While in the classroom, only material appropriate to the teaching of the course should be discussed.

IV. Instructors wishing to set-up special sessions for review should do so only in a public classroom or public meeting room.

V. The instructor is not authorized to indicate or suggest to any student the answers to a final examination. They should offer no help to the students relative to interpreting questions on the exam. All exams will be graded at IAAO. Instructors should not attempt to grade the exam or predict the outcome of a student’s examination.

VI. The IAAO Professional Development Committee prohibits instructors from discussing in the classroom IAAO political activities, and specifically discussing candidates campaigning for IAAO offices.

VII. Instructors for IAAO should not say or do anything that would compromise the Association they are representing.
On-Site Administration

Administration
At a Contract or IAAO-Conducted event, IAAO will attempt to keep the administrative duties of an instructor to a minimum. The IAAO considers its instructional staff a group of professionals whose primary function is to teach. However, it is necessary to assign certain administrative duties to instructors, particularly when IAAO staff members are not present. The cooperation of instructors is appreciated.

On occasion, an Education Coordinator representing the Certified Course may request that an instructor perform an administrative function in addition to or in conflict with those listed below. Instructors should inform the Education Coordinator that they have no authority to assume such responsibilities or to alter in any way the normal procedures as outlined in this handbook without authorization from IAAO.

IAAO Instructors Must
I. Teach the program assigned to them.
II. Teach the specified number of hours for workshops and teach 30 instructional hours, exclusive of the final examination, for courses.
III. Administer all final examinations in the class.
IV. Admit all students who have registered for the offering.
V. Report any violation of examination security, class admission procedures, or alterations in the class schedule.
VI. Maintain a class attendance record (required) that will be returned to IAAO and to the coordinator (if necessary).
VII. Collect ALL materials and exams following the appropriate exam time allotted.

IAAO Instructors are not responsible for
I. Collecting tuition or fees.
II. Distributing materials that should be distributed by the Education Coordinator during registration.
III. Administering examinations to anyone not properly registered.

IAAO Instructors Must Not
I. Grade student examinations.
II. Indicate to a student whether or not they passed the examination.
III. Allow students to enter the class to take the examination without IAAO permission.
IV. Give answers to any examination question.

Classroom
Instructional Hours
Agencies have been informed and expect IAAO courses to consist of 30 instructional hours, exclusive of the final examination, and may base attendance credit on this figure. Therefore, IAAO instructors must ensure that the courses they teach run the allotted 30 hours. No agency should abbreviate the schedule in any way. Unauthorized abbreviations of a course may cause the agency to reassess the credit granted, and may also affect the instructor’s IAAO annual performance rating.
The IAAO Professional Development Committee has recommended, and agencies have been informed, that the following is the regular schedule for all IAAO courses.

Monday (registration)  7:30 a.m.-8:00 a.m.
Monday (instruction)  8:00 a.m.-5:00 p.m.
Tuesday (instruction)  8:00 a.m.-5:00 p.m.
Wednesday (instruction)  8:00 a.m.-5:00 p.m.
Thursday (instruction)  8:00 a.m.-5:00 p.m.
Friday (instruction/exam)  8:00 a.m.-5:00 p.m.

(Examinations: allow 2 ½ hours for workshops, 3 ½ hours for courses)

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

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

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

Study Periods
IAAO instructors may conduct additional study periods in the classroom or other public area beyond the normal 30 instructional hours if they feel it would be helpful. However, instructors are not required to teach beyond the assigned 30 hours.

Instructors should not require attendance at the study periods or consider them a substitute for the normal 30 hours of classroom instruction. In a review session the instructor is not to use or refer to an IAAO examination or questions in the examination.

Distribution of Materials
Materials for IAAO courses or workshops will be shipped to the agency or local coordinator within two weeks of the school. The material should arrive at least a week preceding the school. Students should receive their Student Reference Manuals during the registration period conducted by the local Education Coordinator. However, there are materials that the instructor will need to distribute during the course.

The local Education Coordinator should open each shipment and confirm receipt of all required materials prior to the first day of class. Upon receipt of materials, if you are missing, or there is a shortage of material, please let the Education Manager and/or IAAO know right away. Often times, material can be express delivered to the course site by the next morning.

Student Reference Manuals
IAAO will provide each student with a Student Reference Manual and a three-ring binder. In the manual, students will find course material, IAAO Code of Ethics and Professional Conduct page, a summary of the USPAP, a course schedule and assigned readings.

Solutions
IAAO will send solutions for the problems, quizzes, and case studies on yellow, three-hole paper. These solutions will be grouped together by page. The Instructor may have the student work the problem and then distribute the solution pages to them. Any leftover solution pages may be destroyed at the class site.
Textbooks
Students will have assigned readings from one of the following textbooks for all IAAO 30-hour courses. Typically, no textbooks are required for IAAO workshops.

Property Assessment Valuation, 3rd edition, 2010
An introductory textbook that will support courses 101, 102, 112 and 201. An introductory text on assessment administration and basic appraisal principles for all training needs. Contains substantial chapters on mapping, highest and best use, and personal property assessment.

Assessment Administration, 2003
This book covers the three pillars of IAAO: administration, tax policy, and mass appraisal processes that will support course 400. It provides the information needed to set up and manage a successful assessor's office and understand basic principles of an ad valorem system. Topics covered in this text include an overview of property tax systems, basic approaches to management, overview of different types of property, technology-based information systems, and practical approaches to the perform the tasks required of an assessor's office.

Fundamentals of Mass Appraisal, 2011
This textbook has a comprehensive treatment of mass appraisal, which is covered in the 300 series of the IAAO curriculum. This essential tool for mass appraisers replaces and updates the previous Mass Appraisal of Real Property. If you are using automated valuation models, or mass appraisal, you need to understand the principles developed in this textbook. This volume contains everything you need to know to develop a mass appraisal system, build and calibrate models, and conduct a revaluation.

Fundamentals of Tax Policy, 2008
Fundamentals of Tax Policy explores the concepts and philosophy of taxation, the underlying systems for taxation, and the effects of taxation, thus offering insight into current tax policy debates. The book presents a broad overview of general tax policy with an emphasis on property tax policy and supports course 402.

Additional Materials Available
Maps
Courses 600 and 601 have maps to supplement the Student Reference Manual. Students will receive their own set of maps.

Mapping Tool Kit
A Mapping Tool Kit will be provided for students attending course 600, 601 and workshop 650. The toolkit will contain the following items: a pencil, pen, paper, a protractor, and two triangles (one 45 degrees and one 60 degrees, both at least 6” in length), a compass, and an engineer’s scale having divisions of 12, 20, 40, or a triangular engineer’s scale. A compass and small (6 inch) ruler is sent out with Workshop 260.

Supplies
Students should bring a pencil, pen, paper, and a silent, battery-operated calculator (HP12 C is preferable) to all IAAO education programs.
Exam/Evaluation Packet (EEP)

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

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

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

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

Material found in the EEP includes:

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

**Examination Security Forms**

To ensure accurate accounting of all IAAO examinations this form must be completed. There are three sections to this form. (See attachment 8 – Exam Security Form)

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

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

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

A. The examination starting time and date  
B. The time the last student completes the examination.  
C. The number of examinations placed in the EEP for return to the IAAO. This number MUST equal the number originally received. A written explanation must be included with the packet if the number is not the same.  
D. The number of students taking the examination, the number of students who did not take the exam, and the total number of students in the program.
Final Examinations
Final examinations for IAAO courses have been developed by the IAAO Professional Development Department under the guidance of the IAAO Education Sub-Committee. The validity of the examinations depends on security precautions that prevent them from falling into unauthorized hands. IAAO depends on its instructors and proctors to take precautions and follow the specified procedures to maintain security.

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

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

Requests for Manual Grading
While IAAO stands behind the quality of their exam scoring process, the option is available to students to request a manual re-grade. There is a processing fee of $50. (See Attachment 9– Exam Re-grade Request Form)

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

Academic Dishonesty Defined: Serious offenses against the IAAO learning community include cheating, plagiarism, and all forms of academic dishonesty. Cheating or academic dishonesty is defined as the deception of others about one's own work or about the work of another. Specifics on this policy and how it impacts your responsibilities can be found in the IAAO Policy Statement on Cheating (See Attachment 10 – Policy Statement on Cheating)
Rules for Proctoring an Examination

I. The proctor is not to hold any review session utilizing or referring to an IAAO examination or any questions in the examination.

II. Under no circumstances may an IAAO examination be duplicated.

III. During the examination, the proctor is not to prompt students in any way. The proctor is not to give explanations regarding questions on an examination.

IV. Cell phone use by the student is at the proctor’s discretion.

V. The proctor must not advise a student to “skip” a question. If the proctor doubts the validity or clarity of a question, comments can be directed to the IAAO Professional Development Department, but the proctor is not authorized to advise students to disregard any part of an examination.

VI. No student is allowed to use any reference materials, notes, or books while taking an examination. Students may not have paper, books, or briefcases on or around their desks during a final examination session. All calculations of problems should be done in the examination booklet. Any student bringing paper, books, or briefcases to the examination session must leave them in the front of the class, in clear view of the proctor before being issued a final examination.

VII. Students may use calculators.

VIII. Students leaving the room during an examination session for any reason must bring both the examination and answer sheet to the proctor. Proctors should announce this procedure to all students at the beginning of the examination session.

IX. There should be no conversation between students during the examination session. Students should be warned that covert use of books or other study materials will be construed as cheating. Proctors are authorized to inform offending students that their examinations cannot continue and will be considered void by IAAO. Proctors are to attach an explanation of the specific offenses to the student’s examination before returning it to IAAO.

X. Most students complete IAAO examinations in 1 to 3 hours, depending on the course. An examination time limit of 3-½ hours shall be in effect for all 30-hour IAAO courses. An examination time limit of 2-½ hours shall be in effect for all IAAO workshops, except Workshop 151 – National USPAP which shall have a time limit of 1 hour. IAAO two-part exams will have a maximum time limit of 7 hours with an one-hour break between exams.

XI. The proctor should not leave the room at any time during the examination session.

XII. The proctor must collect all examinations distributed to students and none may be retained by either the student or the proctor. If a student does not complete an examination, it still must be turned in to the proctor. Proctors should ensure that all answer sheets turned in by students are accompanied by an examination booklet. An answer sheet turned in without the examination booklet will be considered void.
Logistical Report / Instructor Comment Forms

This form asks the instructor to do two things 1) Describe any problems with the logistics of teaching the course. Problems with the facilities, audio-visual equipment, room layout, etc. should be identified on this sheet and 2) Provide feedback on course material as our comments will help improve IAAO’s curriculum. Completion of the Logistical Report / Instructor Comment Report Form is optional. At the conclusion of every program, sign and return the form in the EEP. (See attachment 11 – Logistical Report / Instructor Comment Form)

IAAO asks all instructors to take a copy of the student reference manual from those shipped and keep it for the express purpose of recording errors. That extra manual will not be charged to the local school coordinator. Recording should take the form of circling the actual error and indicating the instructor’s suggested correction. Please be as concise yet complete as you can in describing the nature of the problem and the proposed solution. All pages on which corrections are made should be sent back to IAAO along with the pink sheet referencing the included pages.

Second, IAAO staff will review the errors to establish which are clerical / formatting errors and which represent appraisal problems. When the error is clerical or formatting, it will be immediately corrected by staff on the electronic copy and a hardcopy reproduction printed. When the error is not easily identified as clerical or formatting, it will be sent to all members of course review committees.

Attendance Sheets

IAAO has been requested by Appraiser Certification and Licensure Boards to enforce strict attendance policies for our courses, workshops, and seminars. Specifically, to ensure that students receive credit from their state organizations for attending IAAO programs it is necessary for IAAO to require attendance sheets.

The student attendance sheets should be distributed on the morning of the first day of class and then again in the afternoon. This process should be repeated until the program is completed. If the student is not in attendance for either an a.m. or p.m. session, the Instructor should mark an X in the spot where the initials should be, so that a student cannot go back to fill in their initials for sessions that they missed.

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

At the end of the course these forms should be returned to IAAO along with the other materials in the EEP. These attendance forms will be kept at IAAO. (See attachment 12– Attendance Sheets)

Education Record Scanner Forms

Instructors are to distribute the scanner forms (See attachment 13 – Education Record Scanner Form) on Monday and have the students fill out everything except the “Test Section.” All students should fill out a scanner form, whether they plan on taking the exam or not. IAAO asks that instructors personally review or have the class review each other’s forms for errors. On the course’s last day, provide the students time to review their form before handing out the examination booklet.

Students are to place only one letter or character in a box and print as neatly as possible, as well as fill in the corresponding oval beneath the box. For accurate processing, it is important that complete information is provided in both the boxes and ovals.
Students MUST use #2 pencils to complete the form. The markings need to be dark. Felt tip markers and ink pens are NOT allowed. Students should fill in the form as completely and carefully as possible and avoid making stray marks and incorrect markings.

Instructors, when returning the completed scanner forms to IAAO, should not leave them in the examination booklet. Instead, the scanner forms should be rubber-banded to the chip board in one (alphabetical) stack. This small detail will aid us in processing these forms more quickly.

I. **Name:** Please note the order in which the student’s name is entered; last name is first, then first name, then middle initial. Students should enter a letter per box and then fill in the oval below that corresponds to that letter.

II. **Last 4 digits of Social Security Number:** The student’s last 4 digits of their social security number represent the student’s identification number. The field **must be filled with a 4 digit number**.

III. **Course Number:** The three-digit reference code number of the course.

IV. **IAAO Member:** Students should indicate whether they are members of IAAO or not. This information will help our record keeping.

V. **E-Mail Address:** Students should write their entire email address in this field. If the address is longer than the space provided, they should write their email, in its entirety, but do not fill in the associated ovals. If their email address contains numerics, again, they should write their full email address but do not fill in the associated ovals.

VI. **Jurisdiction Or Company:** Employer name: you may abbreviate to fit it in the boxes provided.

VII. **Mailing Address:** This is the mailing address where students want examination results to be sent. Abbreviations may be used. Inaccurate or incomplete entries in this field will result in exam results being delayed.

VIII. **Activity Number:** This is the tracking number assigned to the particular class (i.e. 0000063571) and is used for IAAO accounting and Professional Development Department record keeping. If you are unsure of the course’s activity number, it is listed on the Examination Security Form.

IX. **E SER Number:** Serial number of the course exam. Every IAAO course exam has its own unique exam serial number. Please note that this number is different from the exam booklet number. If you are unsure of the exam serial number, it is listed on the Examination Security Form.

X. **Exam Number:** This is a 5 digit number and is located in the upper right hand corner of each exam booklet. Students should not have the same number in the E SER NUMBER as they have in the EXAM NUMBER boxes.

*Note: Each student in the class should have the same information entered for the following fields: Class Number: Course and Section, Activity Number, And E Ser Number.*
Uniform Request for Re-certification Credit Forms
These forms are available for students seeking re-certification credits from their state appraisal board or from other professional associations. If a student requests this form, please sign on the appropriate line. Please note: These forms should not be distributed until the completion of the course. (See attachment 14 – Instructor/Course Evaluation Form)

Instructor/Course Evaluation Scanner Forms
Every student should receive an instructor/course evaluation scanner form. These forms should be completed by the students and are used to evaluate the instructor’s performance as well as the course material. A student who is not taking the examination should fill out the form the day before the exam date. All evaluations should be returned with the EEP contents. A large envelope will be provided in the EEP to secure the instructor/course evaluation scanner forms. Please designate a student to collect the forms and seal the envelope. These evaluations are to be anonymous and confidential. (See attachment 15 – Instructor/Course Evaluation Form)

Returning the Exam/Evaluation Packet (EEP)
After the exam, the instructor should make sure that all examination booklets and scanner forms have been returned. The material returned to IAAO in the EEP should include:
I. All completed and unused scanner forms. (Place in plastic folder, when provided or rubber band all exam scanner forms between two pieces of cardboard.)
II. All used and unused exam booklets
III. Instructor / Course Evaluation Scanner Forms in sealed envelope
IV. The Examination Security Form signed by the instructor
V. The Instructor School Logistical Problem / Instructor Comment Form signed by the instructor
VI. The attendance sheets
VII. Any complete or unused membership application forms
**Please note: any leftover solution pages may be destroyed at the class site.**

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

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

Please do not guarantee a specific date when students should expect to receive their exam results. Typically, results are mailed to the participants within four to six weeks after the program. In addition, do not encourage students to call the IAAO office to find out their score. Professional Development Department policy is not to release scores over the phone or via email.
Examination Report and Certificates
Seventy percent is the minimum passing score on all exams except for Workshop 151 – National USPAP (2014-2015), which is 72%.

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

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

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

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

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

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

The certificates will be personalized with the student’s name, course name, number of hours and date the course was offered. The student’s name will appear exactly as it was completed on the pink scanner form so an accurate entry is imperative. (See attachment 16– Certificate of Course Completion)

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

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

Honorarium
The instructor will be remunerated his/her honorarium within 90 days upon completion of the course, as stated on the Contract for Teaching Assignment. Due to the changes in IRS policy we have made some adjustments in order to protect both IAAO and you. We will pay instructors a flat fee whenever you are directly teaching an IAAO-Conducted or Contract program. (See Attachment 17 – Instructor Honorarium Structure) IAAO will issue 1099’s to all instructors. Your social security number or Federal Tax Identification number is required. All IAAO instructor contracts will follow this procedure.

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

Flat fee for Senior Instructors:
- $1,500 – One-Day Forum/Workshop
- $2,350 – Two-Day Workshop
- $2,750 – Two ½-Days Workshop
- $3,050 – Three-Day Workshop
- $3,800 – Four-Day Workshop
- $4,250 – Five-Day Course

Flat fee for Regular Instructors:
- $1,150 – One-Day Forum/Workshop
- $1,900 – Two-Day Workshop
- $2,000 – Two ½-Days Workshop
- $2,350 – Three-Day Workshop
- $2,650 – Four-Day Workshop
- $3,200 – Five-Day Course

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

Instructor Evaluation Summary Report
The ratings and comments from the Instructor Evaluations that students complete at the end of the program will be summarized into one report. This report should be helpful to you in reviewing your performance as an instructor. (See attachment 18 – Instructor Evaluation Summary Report)

A separate page will list each comment written on the evaluation forms. (See attachment 19 – Evaluation Comment Summary)

Class List
A computer printout that lists the pass (P), fail (F), and no-examination (N/E) results for the course will be sent to you. Statistics such as pass/fail/no exam quantity and percentage will be included on a separate report called the “Item Analysis Report. It will also list the mean score, median score, standard deviation, and range. (See attachments 20 – Class Pass Fail List and 21 – Standard Item Analysis Report)
Further information about publications, membership services, educational programs, professional designations, and requirements for membership may be obtained by writing IAAO, 314 W. 10th Street, Kansas City, MO 64105 or calling 816-701-8100.

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

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

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

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

Curriculum Manager 816-701-8177
Designation Program Manager 816-701-8137
PDD Operations Director 816-701-8133
Shipping & Fulfillment Manager 816-701-8131
PDD Assistant Operations Manager 816-701-8136
PDD Administration Assistant 816-701-8111
Special Projects Coordinator 816-701-8101
## IAAO Instructor Handbook
### Attachments

<table>
<thead>
<tr>
<th>Attachment Title</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment #1 IAAO Curriculum Listing</td>
<td>37</td>
</tr>
<tr>
<td>Attachment #2 Criteria for Instructor Selection, Qualifications, Evaluation and Conduct Guidelines</td>
<td>39</td>
</tr>
<tr>
<td>Attachment #3 Trainee Comment Form</td>
<td>47</td>
</tr>
<tr>
<td>Attachment #4 Trainee Evaluation Form</td>
<td>48</td>
</tr>
<tr>
<td>Attachment #5 Instructor Assignment Confirmation Letter</td>
<td>50</td>
</tr>
<tr>
<td>Attachment #6 Memo on Student Reference Manuals</td>
<td>51</td>
</tr>
<tr>
<td>Attachment #7 Contract for Teaching Assignment</td>
<td>52</td>
</tr>
<tr>
<td>Attachment #8 Examination Security Form</td>
<td>54</td>
</tr>
<tr>
<td>Attachment #9 Exam Re-Grade Request Form</td>
<td>55</td>
</tr>
<tr>
<td>Attachment #10 IAAO Policy Statement on Cheating</td>
<td>56</td>
</tr>
<tr>
<td>Attachment #11 School Logistical Problem / Instructor Comment Report Form</td>
<td>59</td>
</tr>
<tr>
<td>Attachment #12 Attendance Sheets</td>
<td>60</td>
</tr>
<tr>
<td>Attachment #13 Education Record Scanner Form</td>
<td>61</td>
</tr>
<tr>
<td>Attachment #14 Uniform Request for Re-certification Credit form</td>
<td>63</td>
</tr>
<tr>
<td>Attachment #15 Instructor Evaluation Form</td>
<td>64</td>
</tr>
<tr>
<td>Attachment #16 Certificate of Course Completion</td>
<td>66</td>
</tr>
<tr>
<td>Attachment #17 Instructor Honorarium Structure</td>
<td>67</td>
</tr>
<tr>
<td>Attachment #18 Summary of Instructor Evaluation</td>
<td>68</td>
</tr>
<tr>
<td>Attachment #19 Evaluation Comment Summary</td>
<td>71</td>
</tr>
<tr>
<td>Attachment #20 Class List Pass Fail</td>
<td>72</td>
</tr>
<tr>
<td>Attachment #21 Standard Item Analysis Report</td>
<td>73</td>
</tr>
<tr>
<td>Attachment #22 IAAO Course Descriptions</td>
<td>74</td>
</tr>
<tr>
<td>Attachment #23 IAAO Workshop Descriptions</td>
<td>77</td>
</tr>
<tr>
<td>Attachment #24 Differences: Certified, Contract, IAAO-Conducted Programs</td>
<td>81</td>
</tr>
<tr>
<td>Attachment #25 Rules and Procedures for Proctoring IAAO Examinitions</td>
<td>83</td>
</tr>
</tbody>
</table>
### Curriculum Listing

#### Courses:

<table>
<thead>
<tr>
<th>Course No.</th>
<th>Course Title</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>Fundamentals of Real Property Appraisal</td>
<td>30.0</td>
</tr>
<tr>
<td>102</td>
<td>Income Approach to Valuation</td>
<td>30.0</td>
</tr>
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<td>112</td>
<td>Income Approach to Valuation II</td>
<td>30.0</td>
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<td>201</td>
<td>Appraisal of Land</td>
<td>30.0</td>
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<td>300</td>
<td>Fundamentals of Mass Appraisal</td>
<td>30.0</td>
</tr>
<tr>
<td>311</td>
<td>Residential Modeling Concepts</td>
<td>30.0</td>
</tr>
<tr>
<td>312</td>
<td>Commercial/Industrial Modeling Concepts</td>
<td>30.0</td>
</tr>
<tr>
<td>331</td>
<td>Mass Appraisal Practices &amp; Procedures</td>
<td>30.0</td>
</tr>
<tr>
<td>332</td>
<td>Modeling Concepts</td>
<td>30.0</td>
</tr>
<tr>
<td>333</td>
<td>Residential Model Building</td>
<td>30.0</td>
</tr>
<tr>
<td>400</td>
<td>Assessment Administration</td>
<td>30.0</td>
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<td>402</td>
<td>Tax Policy</td>
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<td>500</td>
<td>Assessment of Personal Property</td>
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<tr>
<td>501</td>
<td>Personal Property Auditing: Basic to Advanced</td>
<td>30.0</td>
</tr>
<tr>
<td>600</td>
<td>Principles and Techniques of Cadastral Mapping</td>
<td>30.0</td>
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<tr>
<td>601</td>
<td>Cadastral Mapping – Methods &amp; Applications</td>
<td>30.0</td>
</tr>
</tbody>
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#### Workshops:

<table>
<thead>
<tr>
<th>Workshop No.</th>
<th>Workshop Title</th>
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</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>Understanding Real Property Appraisal</td>
<td>15.0</td>
</tr>
<tr>
<td>150</td>
<td>Mathematics for Assessors</td>
<td>15.0</td>
</tr>
<tr>
<td>151</td>
<td>National USPAP</td>
<td>15.0</td>
</tr>
<tr>
<td>155</td>
<td>Depreciation Analysis</td>
<td>15.0</td>
</tr>
<tr>
<td>157</td>
<td>Appraisal Uses of Excel Software</td>
<td>15.0</td>
</tr>
<tr>
<td>158</td>
<td>Highest and Best Use</td>
<td>15.0</td>
</tr>
<tr>
<td>162</td>
<td>Marshall &amp; Swift Residential</td>
<td>15.0</td>
</tr>
<tr>
<td>163</td>
<td>Marshall &amp; Swift Commercial</td>
<td>15.0</td>
</tr>
<tr>
<td>171</td>
<td>IAAO Standards of Professional Practice &amp; Ethics</td>
<td>7.0</td>
</tr>
<tr>
<td>181</td>
<td>National USPAP 7-Hour Update for Mass Appraisal</td>
<td>7.0</td>
</tr>
<tr>
<td>191</td>
<td>National USPAP 7-Hour Update</td>
<td>7.0</td>
</tr>
<tr>
<td>252</td>
<td>Valuing Property Affected by Environmental Contamination</td>
<td>15.0</td>
</tr>
<tr>
<td>257</td>
<td>Fundamentals of Industrial Valuation</td>
<td>15.0</td>
</tr>
<tr>
<td>260</td>
<td>Valuation of Agricultural Land</td>
<td>18.5</td>
</tr>
<tr>
<td>354</td>
<td>Multiple Regression Analysis for Real Property Valuation</td>
<td>11.0</td>
</tr>
<tr>
<td>403</td>
<td>Property Tax Policy, Alternatives &amp; Modules</td>
<td>18.5</td>
</tr>
<tr>
<td>452</td>
<td>Fundamentals of Assessment Ratio Studies</td>
<td>18.5</td>
</tr>
<tr>
<td>551</td>
<td>Valuation of Machinery and Equipment</td>
<td>18.5</td>
</tr>
<tr>
<td>552</td>
<td>Personal Property Auditing, Basic</td>
<td>18.5</td>
</tr>
<tr>
<td>553</td>
<td>Personal Property Auditing, Advanced</td>
<td>18.5</td>
</tr>
<tr>
<td>650</td>
<td>Principles and Techniques of Cadastral Mapping</td>
<td>15.0</td>
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<td>651</td>
<td>GIS for Assessors</td>
<td>15.0</td>
</tr>
<tr>
<td>850</td>
<td>CAE Case Study Review</td>
<td>18.5</td>
</tr>
<tr>
<td>851</td>
<td>RES Case Study Review</td>
<td>18.5</td>
</tr>
<tr>
<td>852</td>
<td>AAS Case Study Review</td>
<td>18.5</td>
</tr>
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<td>854</td>
<td>CMS Case Problem Review</td>
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<td>Hours</td>
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<td>-------</td>
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<td>-------</td>
</tr>
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<td>909</td>
<td>Valuation of Commercial Properties in a Declining Market</td>
<td>7.5</td>
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<td>910</td>
<td>Valuation of Convenience Stores</td>
<td>7.5</td>
</tr>
<tr>
<td>911</td>
<td>Valuation of Contaminated Properties</td>
<td>7.5</td>
</tr>
<tr>
<td>917</td>
<td>How to Critique an Appraisal</td>
<td>7.5</td>
</tr>
<tr>
<td>931</td>
<td>Reading and Understanding Leases</td>
<td>7.5</td>
</tr>
<tr>
<td>932</td>
<td>Restructuring Income/Expense Statements</td>
<td>7.5</td>
</tr>
<tr>
<td>950</td>
<td>IPMS Residential Buildings</td>
<td>7.5</td>
</tr>
<tr>
<td>960</td>
<td>Marshall &amp; Swift Residential – Square Foot Method</td>
<td>7.5</td>
</tr>
<tr>
<td>962</td>
<td>Marshall &amp; Swift Commercial – Square Foot Method</td>
<td>7.5</td>
</tr>
<tr>
<td>990</td>
<td>Residential Appraisal: New Things to Think About</td>
<td>7.0</td>
</tr>
<tr>
<td>991</td>
<td>Understanding and Using Comparable Transactions</td>
<td>7.0</td>
</tr>
</tbody>
</table>
Attachment #2

Becoming an IAAO Instructor

Application Procedures

Instructor Criteria as Approved by Executive Board

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

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

I. Qualifications:

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

A. A bachelor’s degree in any field and five (5) years of experience directly related to the subject matter to be taught.
B. A master’s degree in any field and five (5) years of experience directly related to the subject matter to be taught.
C. A master’s or higher degree in a field that is directly related to the subject matter to be taught; five (5) years of experience directly related to the subject matter to be taught.
D. Five (5) years of real estate appraisal teaching experience directly related to the subject matter to be taught. In order to qualify as teaching experience the courses/seminars/workshops, ODF taught must meet at least one of the following minimum requirements.*
   1. Course/seminar is approved by the AQB Course Approval Program.
   2. Course/seminar is approved by a US state or territory for state appraisal licensing/certification credit.
   3. Course is taught through an accredited college or university.
   4. Course/seminar is approved for credit through an established professional appraisal organization, state assessor or appraiser agency.
   *Distance education courses are not applicable for use as teaching experience.
E. Five (5) years of specialty teaching (cadastral mapping or assessment administration) experience directly related to the subject matter to be taught.
F. Seven (7) years of real estate appraisal experience directly related to the subject matter to be taught.
G. Seven (7) years of specialty experience (cadastral mapping or assessment administration) experience directly related to the subject matter to be taught.

One year of appraisal experience is defined as:

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

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

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

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

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

II. Qualifications

The following will constitute the progression of IAAO instructors:

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

a) Successful completion of an IEW, and
b) Passed a training assignment under a senior or senior specialty instructor, in a state/province other than the state/province of residence of the trainee, and
c) A candidate for an IAAO designation
d) Be an IAAO member in good standing

❖ If the trainee does not complete item c above within two (2) years, they will be suspended, and may only instruct as an In-State instructor until they obtain their designation.

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

a) Successful completion of an IEW
b) Successfully completed (attended at least 50 minutes of each 60 minutes of instruction and passed the final examination) or served as either author or reviewer of the IAAO Course or Workshop they wish to instruct. Equivalent education and examination challenges do not substitute for this requirement.
c) Be an IAAO member in good standing
In-State instructors will be required to prove requirements a) and b) listed above with every application to instruct a course/workshop. In-State instructors may only instruct IAAO programs that are conducted on a “certified” basis.

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

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

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

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

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

There will be four classes of specialty instructors:

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

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

- a) Hold an AAS, CMS, PPS or RES designation
- b) Have completed three teaching assignments as a regular instructor
- c) Be an IAAO member in good standing

There will be four classes of senior specialty instructors:

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

4. RES Designee will be called a Senior Residential Instructor: Eligible to teach Courses 101, 102, 201 and Workshops 155 and 252.

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

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

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

III. Conduct

A. During teaching assignments, instructors must conduct themselves with integrity. They should maintain an appropriate professional relationship with students attending IAAO courses, both in and outside the classroom.

B. It is the policy of IAAO to promote a positive learning environment for all students. Harassment and/or discriminatory behavior directed toward a person because of his or her race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information is expressly prohibited. Instructors are obligated to refrain from such behavior and are required to discourage such behavior from occurring in the classroom by others.

C. While in the classroom, only IAAO approved material should be discussed.

D. Instructors wishing to set up special sessions for review should do so only in a public classroom or public meeting room.

IV. Maintaining Instructor Status

A. All instructors, including in-state, regular, senior, & senior specialty instructors, must maintain their IAAO membership in good standing. If an instructor does not meet this requirement, they must pay one year in arrear and current calendar year to meet membership requirement. If they would like to take a training assignment, they must wait the current year before they can accept the assignment.

B. All national instructors, regular, senior, & senior specialty instructors, must maintain their IAAO designation.

C. All instructors, including in-state, regular, senior, & senior specialty instructors, must instruct an IAAO course/workshop/One Day Forum at least once in a period of three consecutive years. If an instructor does not meet this “three consecutive years” requirement, they will be removed from active instructor status until which time they attend and pass another IEW, in its entirety. For One Day Forum (ODF) instruction, the instructor must distribute IAAO’s evaluation form and provide the completed evaluations to IAAO Headquarters, Professional Development.
D. All instructors, including in-state, regular, senior, & senior specialty instructors, are required to attend an Instructor Meeting at the annual conference or participate in an Instructor Meeting Webinar at least once every three years. All instructors, including in-state, regular, senior, & senior specialty instructors, are required to attend an Instructor Meeting at the annual conference or participate in an Instructor Meeting Webinar at least once every three years. If an instructor does not meet this requirement, they must review the recording of the previous year’s instructor meeting and also attend the current year’s meeting before they will be added to the active instructor list.

E. There is no tenure for IAAO instructors. Reappointment depends on continued good teaching in the classroom and good standing with IAAO.

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

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

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

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

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

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

New IAAO Curriculum - When IAAO develops a course or workshop that is not already in its curriculum, the developer or developers of the course or workshop will conduct the rollout of the material. In the instances when the Education Sub-Committee has approved a new course or workshop, the Education Sub-Committee will designate the rollout presenter and notify the Instructor Relations Sub-Committee (IRSC) and the IRSC liaison of who the party is. New contracts by IAAO for new course development & workshops should address these requirements.
Instructor's qualifications for “new IAAO curriculum” as defined under the heading New IAAO Curriculum: An existing IAAO instructor can qualify to teach new IAAO curriculum by meeting any one of the below four requirements. The exam may be taken after the training or proctored according to IAAO rules and procedures. IAAO will provide the proctored exam at cost (expenses only) for each instructor attending the course overview, local review or webinar. Instructors have 12 months from the date of public notice on the IAAO website that a new course or workshop has been developed to meet one of the below requirements. If the instructor does not do so within this time frame, the instructor must attend and pass the exam for the course or workshop.

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

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

V. Evaluations

The Director of Professional Development shall review all instructors annually.

A. The IAAO Procedural Rules require that the Instructor Relations Sub-Committee train, coordinate, and monitor the quality of the instructor cadre. This “monitoring” takes place in the form of an annual overall performance rating.

B. The Instructor Relations Sub-Committee has determined that all instructors will be evaluated based upon their student evaluations and pass rates in relation to the National Course Average. The normal acceptable range is determined by using +/- 1.5 standard deviation from the National Course Average. Any significant comments brought to the attention of the Professional Development Department staff from students, Education Coordinators and/or instructors will be included in the evaluation. By highlighting these comments we encourage the instructor to take appropriate action to remedy any problems.

C. The Instructor Relations Sub-Committee may conduct evaluations, other than annually, in response to complaint(s) on an instructor. Before an evaluation is conducted, the Instructor Relations Sub-Committee will review the complaint(s) and determine if the complaint(s) merits any further review.

D. If the Instructor Relations Sub-Committee does an evaluation resulting from a complaint(s), the following guidelines will be used:

1. Instructor Relations Sub-Committee may conduct a conference call with the complainant(s) or conduct a follow-up by written correspondence to confirm the details of the complaint(s).
2. The Instructor Relations Sub-Committee may conduct telephone interviews from randomly selected participants in the course/workshop relating to the complaint(s).

3. The Instructor may be sent a written copy of the complaint(s) but names of the complainant(s) will be omitted. The instructor will have ten (10) days to respond back to the Instructor Relations Sub-Committee or request a conference call with the committee.

4. The committee may review all the information and can take one of the following actions with the complainant(s) and instructor being notified in writing.
   a) No action needed.
   b) Written reprimand to the instructor. This would be a result of an improper action, not following IAAO policies and procedures, etc. The reprimand would be placed in the instructors file.
   c) Written reprimand and require the instructor to recertify by attending an IEW before instructing again.
   d) Instructors with significant problems may be asked to meet or can request to meet with a review committee comprised of the Chair of the Instructor Relations Sub-Committee and at least two Senior Instructors not currently on the IRSC. Failure of the instructor to follow any actions by the Instructor Relations Sub-Committee or the review committee could result in the removal of instructor status.
   e) The Instructor Relations Sub-Committee (IRSC) shall appoint an education counseling subcommittee composed of at least two senior instructors that are not currently on the committee and the chair of the IRSC.

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

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

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

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

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

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

Flat fee for Senior Instructors:
- $1,500 – One-Day Forum/Workshop
- $2,350 – Two-Day Workshop
- $2,750 – Two ½-Days Workshop
- $3,050 – Three-Day Workshop
- $3,800 – Four-Day Workshop
- $4,250 – Five-Day Course

Flat fee for Regular Instructors:
- $1,150 – One-Day Forum/Workshop
- $1,900 – Two-Day Workshop
- $2,000 – Two ½-Days Workshop
- $2,350 – Three-Day Workshop
- $2,650 – Four-Day Workshop
- $3,200 – Five-Day Course

Expense Reimbursement

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

Please tell us about your training assignment and experience teaching IAAO course materials. Your comments will help the Education Department evaluate the training procedure and course materials. Thank you for your help.

Activity: Course Date:
Location: Course/Workshop: Senior Instructor:
Trainee: Course Material
Course Material
Location of Problem(s):
☐ Instructor Manual: copyright date ______________ page number(s)
☐ Student Reference Manual: copyright date ______________ page number(s)

Nature of problem:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Traineeship

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<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
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<tbody>
<tr>
<td>Course Materials</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Classroom Facilities</td>
<td>4</td>
<td>3</td>
<td>2</td>
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<tr>
<td>IAAO Staff Assistance</td>
<td>4</td>
<td>3</td>
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<tr>
<td>Senior Instructor Feedback</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
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<tr>
<td>Interaction with Students</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
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<tr>
<td>Overall Teaching Experience</td>
<td>4</td>
<td>3</td>
<td>2</td>
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</table>

Comments:

________________________________________________________________________

________________________________________________________________________

Trainee Signature Date
# IAAO Trainee Evaluation Form

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<tr>
<th>Presence</th>
<th>Excellent (5)</th>
<th>Good (4)</th>
<th>Average (3)</th>
<th>Fair (2)</th>
<th>Poor (1)</th>
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</thead>
<tbody>
<tr>
<td>1. Bearing</td>
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<td>2. Voice (Volume)</td>
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<td>3. Eye Contact</td>
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<td>4. Speech (Clarity)</td>
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Total points

Did they pass this section? **Yes** **No** *(Must have an average score of 3 to pass this section)*

Comments: *(Must provide comments if they failed this section)*

<table>
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<tr>
<th>Classroom</th>
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<th>Poor (1)</th>
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</thead>
<tbody>
<tr>
<td>1. Interaction with students</td>
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<tr>
<td>2. Takes charge of the class</td>
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<td>3. Encourages students</td>
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<td>4. Uses humor effectively</td>
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Total points

Did they pass this section? **Yes** **No** *(Must have an average score of 3 to pass this section)*

Comments: *(Must provide comments if they failed this section)*
### Content

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<th>Good (4)</th>
<th>Average (3)</th>
<th>Fair (2)</th>
<th>Poor (1)</th>
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<tbody>
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<td>1.</td>
<td>Knowledge of subject</td>
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<td>2.</td>
<td>Makes accurate statements</td>
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<td>3.</td>
<td>Relates ideas to others</td>
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<td>4.</td>
<td>Shows how to think through problems</td>
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<td>5.</td>
<td>Shows what is being done and why</td>
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<td>6.</td>
<td>Uses terminology correctly</td>
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<td>7.</td>
<td>Reaches closure on topic</td>
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**Total points**

**Did they pass this section?**  Yes  No  (Must have an average score of 3 to pass this section)

**Comments:** (Must provide comments if they failed this section)

### Presentation

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<tr>
<td>1.</td>
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<tr>
<td>2.</td>
<td>Use of audio-visual</td>
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<tr>
<td>3.</td>
<td>Clarity of explanations</td>
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<tr>
<td>4.</td>
<td>Creativity</td>
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</table>

**Total points**

**Did they pass this section?**  Yes  No  (Must have an average score of 3 to pass this section)

**Comments:** (Must provide comments if they failed this section)

**What are the Trainee’s particular strengths and/or weaknesses?**

**Recommendation:** (Must pass all 4 sections to receive a passing score)  PASS  FAIL
February 2, 2018

Larry Clark, CAE  
IAAO  
314 W 10th Street  
Kansas City, MO 64015

Dear Mr. Clark:

This will confirm your assignment as a Senior Instructor for Course 101–Fundamentals of Real Property Appraisal. If an emergency should prevent you from teaching, you agree to contact IAAO Professional Development Department.

Instructors are required to be members in good standing. Our records indicate your IAAO membership has been paid through 12/31/14. If your membership has expired, please contact the membership department at (816) 701-8101 before teaching the course. **Your Instructor ID for evaluations is 0000005027.**

The last revision date for SRM (Student Reference Manual) was August-2013 and IM (Instructors Manual) was August-2013. If you need a new copy, please call me at 816-701-8133.

**Date:** 1/6/2014 - 1/10/2014  
**Location:** Kansas City, MO

**Coordinator:** Jean Spiegel,  
IAAO  
314 W 10th Street  
Kansas City, MO  64105  
Phone: 816-701-8133  
Fax: 816-701-8169  
Email: spiegel@iaao.org

**Activity #:** 1112223334  
**Facilities:** IAAO Board Room

**SPECIAL NOTE FLORIDA INSTRUCTORS ONLY:** Effective December 1, 2002 the Florida Department of Business and Professional Regulation is requiring all course providers to provide the DBPR with electronic course attendance files. These files must be submitted electronically by the 5th day of the month following course completion. This initiative ensures 100% compliance through monitoring for appraisal licensees. It is imperative that **ALL** course participants with a **Florida Appraiser License** provide that license number on the daily attendance sheet. If proof of required continuing education is not submitted prior to renewal of the license, the licensee may be denied renewal.

Should you have any questions, please feel free to contact me.

Sincerely,

Jean Spiegel  
Education Manager

Please sign and return a copy of this form to the address below or fax to 816-701-8169:

Signed___________________________________________ Date______________________________

All Rights Reserved  
Copyright © 2020 by  
IAAO Revised 02/18
MEMORANDUM

TO: ALL IAAO COURSE INSTRUCTORS
FROM: IAAO Professional Development Department
RE: Additional Student Reference Manuals
DATE: February 2, 2018

As of December 1, 2002, IAAO will be providing ONE extra copy of the Student Reference Manual (SRM) when shipping all course materials. The extra SRM is being provided by IAAO for the exclusive use of the course instructor.

We are asking instructors to mark and note on the SRM those areas where corrections, additions or clarifications are necessary. As you find errors, please make your notations on the appropriate page, remove the page from the SRM and include this page with the Instructor Comment Form when returning the information to the IAAO office.

We are all working hard to ensure the quality and integrity of our IAAO course materials. The use of the SRM will help the IAAO staff make course material changes quickly and accurately in the future.

Thank you for your future assistance.
CONTRACT FOR TEACHING ASSIGNMENT

This independent contractor agreement ("Agreement") is entered into this 3rd day of December 2002, by and between the INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS, 314 W. 10th Street, Kansas City, MO 64105 ("IAAO") and «Instructor_Fname_I» «Instructor_Lname»«InstructorDesignation» ("Instructor") for the teaching of «Course», «Course_Title», from «Beginning_Date» to «Ending_Date» in «Location_City» , «Location_State».

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

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

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

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

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

Instructor shall have a right to perform similar instructional services for other clients, whether or not such other clients compete with IAAO. Instructor may not use parts or all of IAAO copyrighted materials nor imply IAAO approval or endorsement of instruction that does not come from IAAO certified or contracted schools. Notwithstanding Instructor's right to perform services for other clients, Instructor shall maintain as confidential, and shall not disclose to any other person or entity, any confidential or proprietary information of IAAO that is disclosed to Instructor in connection with his or her performance of services under this Agreement. Additionally, when requested by IAAO, after Instructor's teaching responsibilities under this Agreement have been concluded, Instructor shall return to IAAO specified materials provided to instructor by IAAO, and all copies of such materials which may then be in Instructor's possession or control.

IAAO's Education Department will provide Instructor with further information concerning his or her duties as an instructor of an IAAO course or workshop, and Instructor agrees to devote his or her best efforts to achieving the results IAAO desires for the particular course or workshop to be taught by Instructor.
It is understood by the parties that Instructor is an independent contractor and not an employee of IAAO. IAAO will have no obligation for worker’s compensation, federal and state payroll taxes, unemployment taxes, social security assessments, or similar taxes or liabilities relating to the performance of services by Instructor under this Agreement. Nor shall Instructor have any authority to bind IAAO in any transaction relating to this Agreement or otherwise.

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

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

By: _________________________________ ____________________
    Instructor                           Date

IAAO

By: _________________________________ ____________________
    Executive Director                   Date
    International Association of Assessing Officers
IAAO Professional Development Department
Examination Security Form

(To the instructor/proctor: Part I of this form should be filled in upon receipt of the examinations from the coordinator and Part II upon sealing the examination container for return to the IAAO office. It should be placed on top of the examinations by the instructor/proctor upon sealing the container.)

Number of examinations shipped by IAAO office______________________________________________

Activity: 1112223334 Instructor(s): Larry Clark, CAE
Date: 1/6/2014 - 1/10/2014 Location: Kansas City, MO
Course/Workshop: 101 - Fundamentals of Real Property Appraisal
Exam Series/Number: 50053

Part I
I received ______ examinations from the local coordinator for the course indicated above. The examinations were sealed in accordance with IAAO guidelines in "Rules and Procedures for Proctoring IAAO Examinations." I have noted any irregularities below.

Signature ____________________________ Date ______________________

Part II
Please indicate:
A) Examination starting time: ____________________________ Date: __________________________
B) Last student completed time: ____________________________

C) ALL EXAMINATIONS for the course indicated above MUST be returned to IAAO in the examination container for mailing back to the IAAO. This number is equal to the number originally received by me in the examination container, with any irregularities noted below.
D) Number of students taking the examination: ______
   Number of students not taking the examination: ______
   Number of unused examinations returned to IAAO: ______
   Total number of students in program: ______
I personally sealed the examination security container for return to IAAO office.

Signature ____________________________ Date ______________________

FOR OFFICE USE ONLY

Date Exams Received: ______ Checked By: ______ Count: ______ Date Mailed: ______ Emailed Coord/Inst ______ IMIS Upload ______
EXAM RE-GRADE REQUEST FORM

APPLICANT INFORMATION: Please type or print!

Name

Jurisdiction/Firm

Title

Address

City   State/Province Zip Code

Phone Number   Fax Number Email

Please indicate:

Exam name and number

Date of exam

City   State/Province

Signature __________________________ Date __________________________

METHOD OF PAYMENT

Payment must accompany the order.

☐ Enclosed is a check for $50.00 (U.S.) ☐ Please bill my VISA or MASTERCARD (Circle One)

Name on Card __________________________ Signature of Card Holder __________________________

Card Number __________________________ Expiration Date __________________________ Card Holder’s Phone Number __________________________

Please attach a copy of your original Examination Report or Certificate of Completion for the exam you would like re-graded. If these documents are unavailable, please provide the following information: Course # and name, date of course (month and year) and course location (city and state). This information is necessary for processing and will also allow us to confirm your attendance and grade before completing this request.
POLICY STATEMENT
ON CHEATING

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

Academic Dishonesty Defined: Serious offenses against the IAAO learning community include cheating, plagiarism, and all forms of academic dishonesty. Cheating or academic dishonesty is defined as the deception of others about one’s own work or about the work of another. Examples of cheating include, but are not limited to:

• Submitting another’s work as one’s own or allowing another to submit one’s work as though it were his or hers.

• Several people completing an assignment and turning in multiple copies, all represented either implicitly or explicitly as individual work.

• Failure to properly acknowledge authorities quoted, cited or consulted in the preparation of written work (plagiarism).

• The use of a textbook, notes and/or cell phones during an examination without permission of the instructor.

• Copying from another student when taking an exam.

• The receiving or giving of unauthorized help on assignments without the expressed permission of the instructor.

• Stealing a problem solution from an instructor.

• Tampering with experimental data to obtain ‘desired’ results or creating results for experiments not done (“dry labbing”).

• Tampering with or destroying the work of others.

• Submitting substantial portions of the same academic work for credit more than once without permission of the present instructor.

• Lying about these or other academic matters.

• Falsifying records, forms or other documents.

• Unauthorized access of computer systems or files.

• Academic dishonesty in a computer assignment will be suspected if an assignment that calls for independent work results in two or more solutions so similar that one can be converted to another by a mechanical transformation.
Preventative Actions and Consequences: Students/candidates who are guilty of academic integrity violations such as these can expect to be penalized; any person who knowingly assists another student/candidate in dishonest behavior is equally responsible and is subject to the same consequences as both would be characterized as an offending student/candidate.

First level of action: To minimize the opportunities for students/candidates to cheat during an examination, instructors/proctors are authorized to:

1) Collect (set aside) all cell phones, textbooks, class notes, etc.
2) Move students/candidates several feet a part from each other (if classroom space allows).
3) Ask students/candidates to move to another seat during the exam if cheating is suspected.
4) Issue a verbal warning to the student(s) addressing the inappropriate behavior or action.

Second level of action. When cheating is suspected, instructors/proctors are authorized and expected to inform an offending student that his/her suspect behavior cannot continue and his/her examination may be considered void by IAAO. The student/candidate may be required to retake an exam on which he/she was suspected to have cheated.

If inappropriate behavior or action persists, the instructor/proctor will notify the student of the instructor/proctor’s intent to file a Report of Suspected Academic Dishonesty.

Report of Suspected Academic Dishonesty. Instructors/proctors are required to attach an explanation of the specific offenses to the student’s assignment or examination before returning it to IAAO. The report will contain the instructor’s or proctor’s name, course name, or case study name, examination date, location, coordinator’s name, student’s name and a complete report of the suspected academic dishonesty and all actions taken by the instructor/proctor.

A copy of the report will be issued to the IAAO Director of Professional Development, the appropriate IAAO committee in charge, and the student. In the case of course examination, a general notice, with student name(s) redacted, will be issued to the course coordinator.

The instructor/proctor shall have the authority to deal with instances of academic dishonesty in a variety of ways including (but not limited to) recommending to IAAO the following courses of action:

1) Work may be redone for full or partial credit.
2) Alternate assignments may be given for full or partial credit.
3) Work may not be redone and no credit will be given for that particular assignment.
4) The student may be dropped from the course.

Repeated incidents. If a second documented report of an academic integrity incident has been upheld by the IAAO Executive Board for any person in an IAAO course, workshop or designation program, the person will be ineligible for participation in the IAAO designation program (if applicable).

Any student found to academically dishonest as defined in this policy has the right to appeal through the regular channels as established by the appeal process.
Appeals process. The appeals process shall proceed as follows:

1) Notice is issued to the student of alleged academic dishonesty with an opportunity for the student to respond.
2) An Appeals Committee will review the Report of Suspected Academic Dishonesty and any response from the student. The appeals committee will be the Professional Development Subcommittee with responsibility for the designation, or the Instructor Relations subcommittee for a course examination.
3) Should the student wish to pursue it, the findings of the Appeals Committee may be appealed to the Professional Development Appeals Committee, made up of the super chair of the Professional Development Committee and the chair of each of its subcommittees, the Education Subcommittee, the Instructor Relations Subcommittee and Professional Designation Subcommittee.
4) An appeal of the Professional Development Appeals Committee may be made to the IAAO Executive Board. The Executive Board’s ruling is final.

The effective date of this policy is July 21, 2007.

Implementation:
A copy of this policy will be included in each Student Reference Manual provided by IAAO. A copy of this policy also will be provided to each course coordinator before the course, as well as to proctors and candidates before the case/master examinations.
IAAO Professional Development Department

Instructor School Logistical Problem Form

Problem: (please be specific)

Activity: 111223334344445555566666777778888899999

Instructor(s): Larry Clark, CAE

Date: 1/6/2014 - 1/10/2014

Location: Kansas City, MO

Course/Workshop: 101 - Fundamentals of Real Property Appraisal

Facility Comments:

________________________________________________________________________________

________________________________________________________________________________

Non Facility Comments (such as class size, class experience, etc….)

________________________________________________________________________________

☐ Check here if there were no problems.

(Note: If there was a problem with the course content, please use the below Instructor Comment Report Form)

Instructor Comment Report Form

Please let us know about any problems that you have found with the IAAO program materials. Your in-the-field comments will be used when revising and updating the program materials. If you identify an error in the manuals (SRM or IM), please copy or remove from an unused manual, the page with the error and attach it to this form. Please highlight what the error is and what the possible remedy/solution is to the error. If removing a page from an unused manual, please attach a note to it to let us know that it is no longer a complete manual. Thank you for your help.

Nature of problem: (Please attached page of SRM)

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

Please return in the EEP or mail to:

IAAO Professional Development Department, 314 W 10th Street, Kansas City, MO 64105
## Attendance Sheet

**Activity:** 1112223334  
**Instructor(s):** Larry Clark, CAE  
**Instructor ID:** 000005027  
**Date:** 1/6/2014 - 1/10/2014  
**Location:** Kansas City, MO  
**Course/Workshop:** 101 - Fundamentals of Real Property Appraisal

<table>
<thead>
<tr>
<th>Name</th>
<th>Appraiser License Number (FL, OH, MN Only)</th>
<th>Last 4 digits SS# or IAAO member #</th>
<th>Monday</th>
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**Instructor/Coordinator Signature**  

__________________________________________________________________________  
**Date**

---

The Education Subcommittee has responded to higher standards of The Appraisal Foundation (TAF) by setting an attendance policy for all educational classes offered through IAAO. The new policy went into effect on April 1, 2010. The policy states that students must attend 90% of the class hours to achieve the full number of educational hours offered for the course. Anything less than 90% attendance will result in zero hours of credit.
Attachment #13

Procedure for IAAO Scanner Form Completion

The following information is provided to assist you in instructing students on completing the enclosed scanner forms.

Please distribute the scanner forms TO EVERY STUDENT on the first day of class. Every participant in an IAAO educational program, regardless of whether he or she is taking the examination, must complete the enclosed scanner form. During the week, please review the student's forms for errors. On the last day, give students some time to fill in the ovals before distributing the examination. It is important that each oval is filled out for the appropriate letter. The information supplied on the scanner form is the information used on the student's examination results, certificates of attendance and completion, and mailing labels.

Students must use a #2 PENCIL to complete the form, not pen. Using another type of pencil or pen may cause inaccuracies in grading. The markings should be dark. If you wish to correct some of the mistakes, you may do so, or have the students check each other's work.

NOTE: Remind students that blank answers DO count against their final score.

THE FRONT OF THE SCANNER FORM

- **Name** - Last, first, middle initial

- **4 Digit Student ID Number**
  *Must have 4 digit number*, preferably the last 4 digits of SS# (example: XXX-XX- 4122). Only 4 digits should be bubbled in on the form.

- **Course Number**
The three-digit reference code number of the program (example for: course 101 = 101).

- **I am a member of IAAO or I am not a member of IAAO**
  Students should indicate whether or not they are IAAO members. This information assists in database identification and record keeping.

- **E-Mail Address**
  Write entire email address in this field. If the address is longer than the space provided, write email, in its entirety, but do not fill in the associated bubbles. If email address contains numerics, again, write full email address but do not fill in the associated bubbles.

- **Jurisdiction or Company**
  This is the student's employer. Abbreviations are acceptable.
THE BACK OF THE SCANNER FORM

☐ Mailing Address (IMPORTANT)
Street address, city, state, and zip code that you want your results sent to.

TEST SECTION

TO BE FILLED OUT BY ALL STUDENTS REGARDLESS OF WHETHER THEY TAKE AN EXAMINATION, OR NOT.

☐ Activity Number for your program is: 1112223334

TO BE FILLED OUT BY THOSE STUDENTS TAKING AN EXAMINATION

☐ E-SER Number for your program is: 50053

☐ Exam Number Use the five digits located in the upper right hand corner of every exam booklet. This number differs from booklet to booklet. Students should not have the same number in the E-SER Number and Exam Number boxes, as this will jeopardize the accuracy of their results.

Please Note: Each student in the course should have the same information entered for the following fields: Class Number (Course) and Activity Number.
UNIFORM REQUEST FOR RECERTIFICATION CREDIT

This form was developed for your convenience in reporting continuing education to various appraisal organizations. **It does not imply automatic acceptance by any organization of an educational program. Each group retains its own recertification requirements and procedures for requesting credit.** A copy of the program brochure or outline may be required.

1. This form must be completed in its entirety. **PLEASE TYPE OR PRINT!**
2. Please submit a copy to each organization from which you are requesting credit.
3. It is suggested that you keep a photocopy of each form submitted.

---

**STATE LICENSE #**

**TYPE OF LICENSE**

**ORGANIZATION TO WHICH SUBMITTED**

**DESIGNATION**

**MEMBER #**

**MEMBER NAME**

**International Association of Assessing Officers**

**SPONSORING ORGANIZATION**

**101 – Fundamentals of Real Property Appraisal**

**TITLE OF PROGRAM**

**January 6-10, 2014**

**PROGRAM DATES**

**Larry Clark, CAE**

**INSTRUCTOR / PRESENTERS**

This course provides an introduction to mass appraisal and is a prerequisite for the 300 series of courses offered by the IAAO. Topics covered include single-property appraisal versus mass appraisal, components of a mass appraisal system, data requirements and analysis, introduction to statistics, use of assessment ratio studies in mass appraisal, modeling of the three approaches to value, and selection of a mass appraisal system.

**DESCRIPTION OF ACTIVITY AND CONTENT**

---

**EVIDENCE OF COMPLETION (SIGNATURE OF INSTRUCTOR OR PROGRAM OFFICIAL)**

I certify that I have completed the above-described professional activity. I am aware that any misrepresentations by me may become subject to disciplinary action.

**SIGNATURE OF MEMBER**

**FOR OFFICE USE ONLY**

**TITLE OF EDUCATIONAL PROGRAM DESCRIBED ABOVE**

**MEMBER NAME**

**MAILING ADDRESS**

**CITY / STATE / PROVINCE / ZIP CODE**

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All Rights Reserved
Copyright © 2020 by IAAO

International Association of Assessing Officers
IAAO Course/Workshop Evaluation Form

You have just completed an IAAO Course/Workshop. Your opinion of the instructor’s knowledge and presentation of the course/workshop material is important to us. IAAO strives to present quality educational classes.

Please complete this evaluation, and return it to your instructor in order to receive your exam. Place only one letter or character in a box and print as neatly as possible. Then fill in the corresponding box. Remember to erase all mistakes thoroughly. Make no stray marks on this form.

Instructor Evaluation:
Please rank the instructor in the appropriate columns.

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<th>Activity number</th>
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Instructor ID Number

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<th>Number of previous IAAO courses attended?</th>
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<th>2</th>
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<tr>
<td>Number of previous Non-IAAO appraisal/assessment courses attended?</td>
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Your comments are very important to us, please make them clear and concise:
Course/Workshop Evaluation:
Please rank the course/workshop in the appropriate column.

<table>
<thead>
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<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
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<tr>
<td>Clarity, conciseness and readability of the student reference manual?</td>
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<td>Applicability of visual aids to the course/workshop/forum?</td>
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<tr>
<td>Stimulation of class participation and discussion through use of class exercises?</td>
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<td>Overall grasp of concepts by students of each module?</td>
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<td>How would you rank the everyday applicability of the skills you acquired from this class to your job?</td>
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<td>How would you rank your class experience overall?</td>
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Your comments are very important to us, please make them clear and concise:

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Please return this evaluation to the instructor prior to leaving.
The Instructor Relations Committee thanks you for your support.
Certificate of Completion

The International Association of Assessing Officers presents this certificate to

Jean M. Spiegel
in recognition of satisfactory completion of

IAAO Course
101 – FUNDAMENTALS OF REAL PROPERTY APPRAISAL
(30.0 hours)

conducted by
The International Association of Assessing Officers

November 21, 2006

[Signature]
Executive Director
INSTRUCTOR HONORARIUM STRUCTURE
(Effective 1/1/16)

The instructor will be remunerated his/her honorarium within 90 days upon completion of the course, as stated on the Contract for Teaching Assignment. Due to the changes in IRS policy we have made some adjustments in order to protect both IAAO and you. We will pay instructors a flat fee whenever you are directly teaching an IAAO-Conducted or Contract program. IAAO will issue 1099’s to all instructors. Your social security number or Federal Tax Identification number is required. All IAAO instructor contracts will follow this procedure.

The fee structure effective on 1/1/16 is shown below.

Flat fee for Senior Instructors:
  $1,500 – One-Day Forum/Workshop
  $2,350 – Two-Day Workshop
  $2,750 – Two ½-Days Workshop
  $3,050 – Three-Day Workshop
  $3,800 – Four-Day Workshop
  $4,250 – Five-Day Course

Flat fee for Regular Instructors:
  $1,150 – One-Day Forum/Workshop
  $1,900 – Two-Day Workshop
  $2,000 – Two ½-Days Workshop
  $2,350 – Three-Day Workshop
  $2,650 – Four-Day Workshop
  $3,200 – Five-Day Course

Expense Reimbursement

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

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July 22, 2008
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Total Responses | 24 | 100 % |

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Total Responses | 24 | 100 % |

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<tr>
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Total Responses | 23 | 100 % |

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<tr>
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<tr>
<td>Fair</td>
</tr>
<tr>
<td>Poor</td>
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</table>

Total Responses | 24 | 100 % |

| Section 2: Course/Workshop Evaluation - How would you rank your class experience overall? |
Attachment #19

Evaluation Comments
F-19494-IAAO

Question: Your comments are very important to us, please make them clear and concise:

★ Very well taught but very difficult material to learn with no prior experience working with residential analysis.

★ [Name] is a very good instructor and very knowledgeable.

★ Would be helpful to have definition in student workbook.

★ Manual needs review.

★ Instructor spoke too softly; sat for most of the class. Instructor was embarassingly unfamiliar with local uniqueness.

★ [Name] was very engaging. Thank you for your great attitude!!

★ The Red book was recommended as a study guide. I did not have this and could not get it before the course. Would like to have it available for purchase at the class.

★ I've been modeling for several years and still learned a lot from this course.

★ Use Alaska examples when appropriate. Note: Alaska is a non-disclosure state.

Question: Your comments are very important to us, please make them clear and concise:

★ Demonstrations/Drills should be referenced in section outline.

★ TMI for one class. Overload. Not enough time to thoroughly illustrate specific areas and familiarize/inorporate concepts.

★ IAAO course materials contained many errors and was not overly instructive.

★ I find the numbering system in the book to be cumbersome, while you are trying to follow a train of thought, you must try and find the same page.

★ The binder had several typos. The slides from examples in our book.

★ Material Demonstrations and problems jumped around a lot back and forth page flipping with in the sections.

July 22, 2008
IAAO Class List
Activity #1112223334, Course 101

Location: Anywhere, USA
Examination Date: January 10, 2014
Instructors(s): Larry Clark, CAE
Coordinator: Jean Spiegel
Course: Fundamentals of Real Property Appraisal
CE Hours: 30.0

<table>
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### IAAO

**Standard Item Analysis Report On Exam1 Version A**

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Course Descriptions

Courses: Thirty hours of instruction and a final examination.

Course 101 - Fundamentals of Real Property Appraisal
The Fundamentals of Real Property Appraisal is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of vacant and improved properties. This course concentrates on the skills necessary for estimating the market value of properties using two approaches to value: the cost approach and the sales comparison approach. The Fundamentals of Real Property Appraisal utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. Recommended: Property Assessment Valuation (PAV) textbook (3rd edition), AQB Approved: 33.50 CE with exam / 30 CE no exam

Course 102 - Income Approach to Valuation
The Income Approach to Valuation is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of vacant or improved properties by the income approach. The material covers real estate finance and investment, capitalization methods and techniques, analysis of income and expenses to estimate operating income, selection of capitalization rates, and application of the approach. The Income Approach to Valuation utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. Recommended: Course 101, Property Assessment Valuation (PAV) textbook (3rd edition), AQB Approved: 33.50 QE, 33.50 CE with exam / 30 CE no exam

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

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

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

Course 201 - Appraisal of Land
Appraisal of Land is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of land. This course concentrates on the skills necessary for estimating land value primarily using the sales comparison approach. Recommended: Course 101, Course 102, Property Assessment Valuation (PAV) Textbook (3rd edition), AQB Approved: 33.50 CE with exam / 30 CE
Course 300 - Fundamentals of Mass Appraisal
This course provides an introduction to mass appraisal and is a prerequisite for the 300 series of courses offered by the IAAO. Topics covered include single-property appraisal versus mass appraisal, components of a mass appraisal system, data requirements and analysis, introduction to statistics, use of assessment ratio studies in mass appraisal, modeling of the three approaches to value, and selection of a mass appraisal system. Recommended: Course 101, Course 102, Fundamentals of Mass Appraisal (FMA) textbook, AQB Approved: 33.50 hours CE with exam / 30 hours CE

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

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

Course 331 – Mass Appraisal Practices and Procedures
This course is designed to build on the subject matter covered in Course 300 – Fundamentals of Mass Appraisal and prepare the student to take the more advanced mass appraisal courses. It teaches the student how to use Excel and SPSS to analyze data and apply it. Much of the emphasis will be on data accumulation and analysis primarily directed toward the cost approach. Along the way the student will learn how to use the graphing and analysis tools within Excel for ratio studies in addition to supporting existing cost schedules or building new ones. Recommended: Course 300, Fundamentals of Mass Appraisal textbook (FMA) - AQB Approved: 33.50 CE with exam / 30 CE

Course 332 – Modeling Concepts
This course introduces and explains fundamentals of mass appraisal model building. Chapter 1 explains the role of models in mass appraisal and describes basic model structures and steps in model development. Chapter 2 covers exploratory data analysis, including descriptive statistics, charts and graphs, and spatial analyses. Chapter 3 describes data transformations, which largely determine the accuracy, achievable for a given database. Chapter 4 introduces multiple regression analysis, including regression statistics and options, the interpretation of results, and separation of land and building values. Chapter 5 covers the review and support of mass appraisal values and chapter 6 describes mass appraisal reporting. The course includes a large number of demonstrations and labs using Excel, which is capable of producing basic models for a limited number of variables. Recommended: Course 300, Course 331, Fundamentals of Mass Appraisal textbook (FMA) – 30 hours - CE AQB Approved: 33.50 CE with exam / 30 CE
Course 333 - Residential Modeling Applications

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

Along with problems and illustrations, more than half of the course is based on hands-on labs in which students work through exercises with real world data to answer questions and construct data transformations, price trends, land and improved residential models, and ratio analyses. The course uses IBM’s user-friendly statistical software package, SPSS (Statistical Package for the Social Sciences), the most common statistical software package used by assessors. Follow-up course 334 covers the development of non-residential mass appraisal models.

**Recommended: Course 300, Fundamentals of Mass Appraisal textbook (FMA), A solid working knowledge of SPSS - 30 hours CE**

Course 400 - Assessment Administration

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

Course 402 - Property Tax Policy

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

Course 500 - Assessment of Personal Property

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

Course 501 - Personal Property Auditing – Basic to Advanced

This course is a combination of the material contained in Workshops 552 and 553. The course includes one exam and eliminates some material that is identical in the two workshops when taught separately. This course provides a foundation for understanding basic financial records, specifically related to fixed assets. The balance sheet, depreciation schedule, and income statement will be described and discussed in much detail. Emphasis will be placed on the pertinent data relevant to the personal property appraiser. In addition, the course expands to advanced discussions of accounting and auditing theory as it relates to fixed assets. Capitalization techniques will also be discussed. A case study including sample financial records will be used to "discover" fixed assets that may otherwise be hidden from the appraiser. **Recommended: Property Assessment Valuation (PAV) (3rd edition) textbook – 30 hours CE**
Course 600 - Principles and Techniques of Cadastral Mapping
Principles and Techniques of Cadastral Mapping is intended to be a comprehensive, interactive program to introduce entry-level map maintenance personnel and assessment technicians to the field of cadastral mapping. Students are presented basic mapping principles and techniques and are expected to demonstrate basic skills that will allow them to plot deeded descriptions in both the metes and bounds land description system and the Public Land Survey System. Principles and Techniques of Cadastral Mapping utilize lectures, classroom discussion, and exercises to emphasize the main concepts and procedures taught in the course. Recommended: Course 101 – 30 hours CE

Course 601 – Cadastral Mapping – Methods & Applications
Cadastral Mapping-Methods and Applications is intended to be a continuation of the mapping science curriculum. It exposes students to aspects of protocol and legal principles that are not covered in Course 600. This course utilizes lectures, classroom discussion and exercises to emphasize the main concepts and procedures taught during the week. Recommended: Course 101 & Course 600 – 30 hours CE
Workshop Descriptions

Workshops: Various hours of instruction with optional examinations.

**Workshop 100 – Understanding Real Property Appraisal**
Understanding Real Property Appraisal is designed to provide the students with a basic understanding of the procedures and techniques used within a mass appraisal office. This workshop introduces students to some of the concepts involved in using two approaches to value: the cost approach and the sales comparison approach. Understanding Real Property Appraisal utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course. **IAAO recertification credit: 15 hours-2 days**

**Workshop 150 - Mathematics for Assessors**
This two-day workshop is designed to provide the student who plans on attending IAAO programs with an understanding of the mathematical concepts and techniques applied in the appraisal and assessment administration disciplines. It is designed for both the beginning student who has limited knowledge of mathematics and those students who wish to refresh their mathematical skills. Topics covered include a review of the basic mathematical functions, negative numbers, decimals, percentages, exponents, roots, mathematical notation, algebra, statistics, and graphs. This workshop includes an exam. **Students will be required to provide their own HP12-C calculator for use in the class. IAAO recertification credit: 15 hours-2 days**

**Workshop 151 – National USPAP**
This workshop covers materials from The Appraisal Foundation, Uniform Standards of Professional Appraisal Practice which includes: Definitions, Preamble, Ethics Rule, Record Keeping Rule, Competency Rule, Scope of Work Rule, Jurisdictional Exception Rule and Standards 1 through 3, and 6 through 10. Supplementary materials include The Appraisal Foundation Uniform Standards of Professional Appraisal Practice (USPAP). This workshop includes an exam. **IAAO recertification credit: 15 hours-2 days**

**Workshop 155 - Depreciation Analysis**
Depreciation Analysis provides a comprehensive, advanced treatment of the techniques of estimating depreciation of residential property. Through a series of market-oriented case studies and demonstration problems, types of depreciation and generally recognized methods for measuring depreciation are covered, with emphasis on the observed condition method. Depreciation measurements are applied to a single subject property, providing experience in analyzing the advantages and limitations of each method. This workshop includes an exam. **Recommended: Course 101. IAAO recertification credit: 15 hours-2 days AQB Approved: 15 CE**

**Workshop 157 – The Appraisal Uses of Excel Software**
The Appraisal Uses of Excel Software Workshop provides the participants with practical, hands-on instruction on the use of Excel to accomplish basic appraisal functions. Participants will be required to bring a laptop computer with a 2003 or 2007 version of Excel installed. They will be given a dataset and a student reference manual. The instructor will take them through a series of steps to achieve value estimates for a small dataset using the cost, sales comparison and income approaches to value. Each participant will be allowed to take the completed spreadsheets with them to use in their jurisdictions. This workshop does not include an exam. **IAAO recertification credit: 15 hours-2 days**

**Workshop 158 – Highest and Best Use**
Highest and best use is a concept in real estate appraisal in which market value is achieved by the reasonably and probable legal land use that results in the highest value. Highest and best use is an essential step in the mass appraisal process and is necessary before market value estimates can be made. Local law may mandate preferential assessments according to specific land uses such as agricultural, historic and so forth rather than the highest and best use. This workshop is designed to provide students with a more in-depth study and understanding of the role and purpose of highest and best use in the appraisal process. Finally, there will be
discussion of the unique situations that sometimes arise in a highest and best use analysis. **IAAO recertification credit: 15 hours-2 days**

**Workshop 162 - Marshall & Swift Residential**
This two-day workshop is designed to teach participants how to utilize the Marshall & Swift Residential Cost Manual. Several case studies are used to enhance the student’s ability to apply this information. This workshop includes an exam. **IAAO recertification credit: 15 hours–2 days**

**Workshop 163 - Marshall & Swift Commercial**
This workshop is designed to teach participants how to use the Marshall & Swift Commercial Valuation Guide. Participants will spend more time working several case study problems to assist them in learning how to apply this service. This workshop includes an exam. **IAAO recertification credit: 15 hours–2 days**

**Workshop 171 - IAAO Standards of Professional Practice & Ethics**
IAAO's "Code of Ethics, Canons and Standards of Professional Conduct" This workshop is designed to provide performance standards for real property, mass, business and personal property appraisal and consulting. Case studies and exercises illustrate the material. This workshop includes an exam. **IAAO recertification credit: 7 hours-1 day**

**Workshop 181 – 7-Hour National USPAP Update for Mass Appraisal**
This workshop is a National 7-hour USPAP Update offered for continuing education for licensure and certification through The Appraisal Foundation. The workshop provides a general overview of USPAP guidelines, advisory opinions, statements, and other appraisal practices with discussion, illustrations and case studies focused on issues relevant to the daily practice of mass appraisers. The course is updated yearly to address changes to USPAP and common misunderstandings. **IAAO recertification credit: 7 hours – 1 day**

**Workshop 191 – National USPAP 7-Hour Update**
This workshop is the National 7-hour USPAP Update offered for continuing education for licensure and certification through The Appraisal Foundation. The workshop provides a general overview of USPAP guidelines, advisory opinions, statements, and other appraisal practices. The course is updated every two years to address changes to USPAP and common misunderstandings. This workshop does not include an exam. **IAAO recertification credit: 7 hours-1 day**

**Workshop 252 - Valuing Property Affected by Environmental Contamination**
This workshop is designed for the appraiser who needs to understand how to deal with valuation of contaminated properties. The course is based on the IAAO "Standard on the Valuation of Property Affected by Environmental Contamination." The workshop addresses all of the issues presented in the standard, including: definitions and terminology, types of contaminating substances, effects of technology, factors affecting value, application of the three approaches to value, government regulations, and recent court decisions. Case problems are included to demonstrate principles discussed. This workshop includes an exam. **Recommended: Course 101,102, IAAO recertification credit: 15 hours-2 days**

**Workshop 257 – Fundamentals of Industrial Valuation**
The workshop covers preparing for the appraisal, the process of visiting the plant, gathering information, etc. It also examines the three approaches to value as they are applied to buildings and to M&E. A variety of core topics are discussed, including an introduction to manufacturing and general information, about industrial processes, that is helpful to the appraisal process. The text includes extensive details about preparing and performing appraisals, and chapters on valuing buildings and structures, land, and machinery and equipment. This workshop includes an exam. **Recommended: Fundamentals of Industrial Valuation textbook, IAAO recertification credit: 15 hours-2 days**
Workshop 260 – Valuation of Agricultural Land
Agriculture has always played a major role in the development of civilization and this class will provide a good understanding of the various types and uses of land that are classified as agricultural. It will also provide the student with an understanding of the need for some type of preferential assessment, and will discuss historical as well as current land tax policy. The current assessment policies in various states as well as Federal Programs will be explained. Crop types and practices that affect classifications and valuations as well as stocking and carrying capacities will be considered. Methods for describing land and the classification of soils by the Natural Resource Conservation Service (NRCS) as well as understanding soil structures and the textural triangle will be taught. Students will also be shown various methods that can be used in the valuation of agricultural lands. IAAO recertification credit: 18.5 hours-2 1/2 days

Workshop 354 - Multiple Regression Analysis for Real Property Valuation
This workshop provides an understanding of the mechanics and application of multiple regression analysis (MRA) in property valuation, as well as instruction in gathering and qualifying data for MRA application. The workshop shows how to develop and use MRA equations as appraisal tools and how to evaluate, using measures of goodness-of-fit and variable importance, the results of an MRA-based practical drill and demonstration problems, and how to follow step-by-step explanations of the MRA process. Although the workshop is open to anyone wishing to acquire a greater understanding of MRA as an appraisal tool, it is particularly valuable for those whose offices are considering using MRA valuation techniques or whose assessments are reviewed by a supervisory agency using MRA. An understanding of both the sales comparison approach and fundamental appraisal statistics is assumed. This workshop includes an exam. Recommended: Course 101, IAAO recertification credit: 11 hours -1 ½ days

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

Workshop 452 - Fundamentals of Assessment Ratio Studies
This workshop provides a very basic introduction to the development and uses of assessment-sales ratio studies based upon the IAAO Standards on Ratio Studies: January, 2007. The workshop covers the topics of sales analysis, sampling, and the development of assessment ratio studies. The workshop also includes material on managerial and technical issues, which include staffing, timing of studies, use of study results, statistical testing, and assessment regressively and progressivity. Recommended: Course 101, IAAO recertification credit: 18.5 hours-2 1/2 days

Workshop 551 – Valuation of Machinery & Equipment
This workshop is designed to provide a formal, systematic, comprehensive program of study for those who assess personal property, specifically machinery and equipment. The very nature of most personal property item provides a challenge in proper valuation – the diversity, mobility or adaptability, and the forces affecting value of personal property frequently make it far more difficult than real property to discover, list and value. The end goal in the appraisal of machinery and equipment is an estimation of market value that is both accurate and equitable. There are three accepted approaches to value. The content of this workshop includes specific application of the three approaches. This workshop includes an exam. Recommended: Course 500, IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 552 - Personal Property Auditing, Basic
This workshop provides a foundation for understanding basic financial records. Specifically to be discussed are those records relating to fixed assets. The balance sheet, depreciation schedule, and income statement will be described and discussed in much detail. Emphasis will be placed on the pertinent data relevant to the personal
property appraiser. Graduates of this workshop will be able to use basic financial records and conduct "audits" of smaller businesses. This workshop includes an exam.  
Recommended: Course 500, IAAO recertification credit: 18.5 hours-2 ½ days

**Workshop 553 - Personal Property Auditing, Advanced**
This workshop expands the understanding of financial records provided in the Basic Personal Property Auditing Workshop and presents advanced discussions of accounting and auditing theory as it relates to fixed assets. Capitalization techniques will also be discussed. A case study including sample financial records will be used to "discover" fixed assets that may otherwise be hidden from the appraiser. This workshop includes an exam.  
Recommended: Course 500, IAAO recertification credit: 18.5 hours-2 ½ days

**Workshop 650 – Principles and Techniques of Cadastral Mapping**
This workshop introduces assessment mapping and related information. It covers the functions and types of assessment maps, mapping techniques, methods of conveying property rights, base maps, land description systems, work maps, parcel identification, mapping system maintenance, and the use of computers in mapping. Practical exercises illustrate the mapping procedures described in the text. This workshop includes an exam.  
IAAO recertification credit: 15 hours-2 days

**Workshop 651 – GIS for Assessors**
GIS for Assessors is an introductory workshop in the IAAO’s Mapping Science Curriculum. This workshop employs a lecture and PowerPoint presentation to illustrate the main concepts of GIS within the scope of assessment administration. If you already have GIS, it is the author’s intentions that this course leaves you thinking about how you currently use your system and consider possible new uses that will make you more productive at your job. If you do not have a GIS, this course provides the knowledge to get started. This workshop includes an exam.  
IAAO recertification credit: 15 hours-2 days

**Workshop 850 – CAE Case Study Review**
This workshop provides a comprehensive review and case study for the valuation of commercial property. Participants are to have had at least the basic appraisal courses and have experience in the appraisal of residential property. This is not an introductory workshop. 

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

**Workshop 851 – RES Case Study Review**
This workshop provides a comprehensive review and case study for the valuation of residential property. Participants are to have had at least the basic appraisal courses and have experience in the appraisal of residential property. This is not an introductory workshop.  

The workshop is approximately 25% lecture and 75% problem solving. There are seven sections consisting of: General Appraisal, Land Valuation, Cost Approach, Depreciation, Sales Comparison Approach, Gross Rent Multiplier and Ratio Studies and Statistics. During the final four hours of the workshop, the students will take a practice case study followed by approximately one-hour of reviewing the case study solutions. The practice case study has fifty questions and ten pages of narrative about the subject jurisdiction and subject property. There is no graded exam.  
IAAO recertification credit: 18.5 hours-2.5 days
Workshop 852 – AAS Case Study Review
This workshop covers topics from the various required courses for the AAS Designation. Topics will include: assessment administration (budgeting and planning), the three approaches to value (cost, sales comparison, and income);
the economic principles of appraisal, highest & best use, time & physical characteristic adjustments, aspects of appraisal accuracy (levels of appraisal and uniformity), calculations of statistical items such as the median, mean, coefficient of dispersion (COD), & standard deviation, tax policy issues and Uniform Standards of Professional Appraisal Practice.
There will also be questions that deal with individual appraisal and assessment administration issues. During the final four hours of the workshop, the students will take a practice case study followed by approximately one-hour of reviewing the case study solutions. The practice case study has fifty questions and approximately 14 pages of background information. There is no graded exam. IAAO recertification credit: 18.5 hours-2.5 days

Workshop 854 – CMS Case Study Problem Review
This workshop provides a comprehensive review of the methods and applications of cadastral mapping. Participants are to have had IAAO’s two mapping science courses and experience in cadastral mapping. This is not an introductory workshop.
There are three sections consisting of: Geometry of the Description, Public Land Survey System, and Rules for Construction of the County Cadastre. Students will be exposed to typical mapping scenarios that they will encounter in the Cadastral Mapping Specialist (CMS) case study. Each exercise is followed by a discussion of the solution. The workshop is approximately 30% lecture and 70% problem solving. There is no graded exam. IAAO recertification credit: 15 hours-2 days
What is the difference between Certified, Contract & IAAO-Conducted Programs?

Certified Programs
- In a certified program the sponsoring agency is responsible for securing the instructor and will be responsible for all expenses and honoraria incurred by and for the instructor. The instructor must be a currently approved IAAO instructor.
- The sponsoring agency will arrange for classroom facilities. The sponsor also assumes the cost of all audiovisual equipment ordered for the program(s), if any.
- The sponsoring agency will handle all registration, including the collection of tuition and fees. IAAO will bill the agency on a "per student basis" for each student attending, whether or not he/she attempts the final examination.
- Certified programs assume no minimum enrollment.
- In a certified program IAAO reserves the right to assign an instructor trainee to any scheduled course.
- IAAO will provide program materials to the agency. The materials include the program's Student Reference Manual, solution pages, and final examination.

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

Contract Programs
- In a contract program, the sponsoring agency will arrange for all classroom facilities. The sponsor also assumes the cost of all audiovisual equipment ordered for the program(s), if any.
- The sponsoring agency will handle all registration, including the collection of tuition and fees. Contract programs assume a minimum enrollment of 25 students or the equivalent fees. Maximum enrollment is 50 students. IAAO will bill the agency on a "per student basis" for each student attending, whether or not he/she attempts the final examination.
- IAAO will assign one qualified instructor for each class and will pay a flat fee for each instructor. IAAO will send a confirmation letter and Contract/or Teaching Assignment to the instructor.
- IAAO reserves the right to assign any instructor to a program. Emergencies may require reassignment of instructors.
- In a contract program, IAAO reserves the right to assign an instructor trainee to any scheduled program.
- IAAO will provide program materials to the agency. The materials include the program's Student Reference Manual, solution pages, and final examination.

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

IAAO-Conducted Programs
IAAO is responsible for promotion, student registration, on-site distribution of materials, classroom facilities, audiovisual equipment, preparation and shipment of materials, instructor selection, honorarium, exam processing, and student record maintenance.
• IAAO will assign instructors and send a confirmation letter and Contract/or Teaching Assignment to the instructor.
• IAAO Senior Instructors receive preference when making assignments. Using alphabetical list instructors who are approved to teach the upcoming program, the Education Manager will call the first name on the list and offer him/her the teaching assignment. If the instructor refuses the assignment, the next instructor is called and the first instructor is moved to the bottom of the list. The process is repeated until an instructor accepts the assignment. The next time an instructor is needed for this particular program; the name after the person accepting the last assignment is called. The processes are repeated as stated above.
• If State Appraiser Certification and Licensure Boards require licensed/ certified instructors, assignments are made accordingly.
• IAAO will pay the instructor honorarium. Instructors should make their own hotel accommodations and transportation arrangements.
• Teaching assignments will usually be made 30 or more days before the first day of the program.

All assignments are made on the assumption that the instructor will teach one class of 50 or fewer students for 30 instructional course hours or the assigned number of workshop hours and proctor the final examination.
RULES AND PROCEDURES FOR PROCTORING IAAO SPECIAL EXAMINATIONS

IAAO Approved Proctors are:

1. IAAO certified instructors
2. Members of the IAAO Education Subcommittee
3. Holders of an IAAO Professional Designation (CAE, RES, CMS, PPS, AAS)
4. Directors of a university extension division

I. Mailing and Processing Procedures

Exams will be sent to the proctor in a large envelope approximately 1 week in advance of the exam date. This envelope is confidential and should only be opened by the person whose name is specified. This envelope will hold the exam booklet(s) and scantron(s) for the student(s) and a self-addressed stamped envelope that the proctor should use to return the exam booklet(s) and scantron(s). Postage has been appropriately marked.

In addition to the examination booklet you will have: (1) an original of the confirmation memo sent to the student(s), (2) a certification form for the Proctor to sign, and (3) a letter with the rules and procedures for proctoring (4) a scantron form that the student needs to fill out completely.

At the conclusion of the examination session, the Proctor is to mail the packet to the IAAO Professional Development Department with completed examinations (plus any uncompleted examinations) and the completed Proctor Certification form.

II. Admitting the Student

The student(s) should only be issued the examination bearing their name. The proctor should verify that he/she can be properly identified. (i.e., driver’s license or social security card)

III. Rules

1. The proctor is not to hold any review session utilizing or referring to an IAAO examination or any questions in the examination.

2. Under no circumstances may an IAAO examination be duplicated.

3. During the examination, the proctor is not to prompt students in any fashion. The proctor is not to give explanations regarding questions on an examination.

4. Cell phone use by the student is at the proctor’s discretion.

5. The proctor must not advise the student to "skip" a question, even if the proctor doubts the validity of the question. If the proctor does doubt the validity or clarity of a question, his comments are invited by the Education Department, but the proctor is not authorized to advise students to disregard any part of an examination.

6. No student is allowed to use any reference materials, notes or books while taking an examination. Paper, books or briefcases are not allowed around the student's desk during a final examination session. All calculations of problems may be done in the examination booklet.
Any student bringing paper, books or a briefcase to the examination session must leave them with the proctor before being issued a final examination.

7. Students **may use** calculators.

8. Students leaving the room during an examination session for any reason must bring both the examination and answer sheet to the proctor. This procedure should be announced to all students at the beginning of the examination session.

9. There should be no conversation between students during the examination session. Needless to say, covert utilization of books or other study material can only be construed as cheating. Students are to be warned of such activity. In cases of continued and blatant cheating, provctors are authorized to inform the offending student that he/she cannot continue the examination and that it will be considered void by IAAO. An explanation of the specific offenses should be attached to the student's examination upon returning it to IAAO.

10. Most students complete IAAO examinations in 1 to 3 hours, depending on the course. An examination time limit of **3-½ hours** shall be in effect for all 30-hour IAAO courses. An examination time limit of **2-½ hours** shall be in effect for all IAAO workshops, except Workshop 151 – National USPAP which shall have a time limit of **1 hour**. IAAO two-part exams will have a maximum time limit of **7 hours** with a one-hour break between exams.

11. The proctor should not leave the room any time during the examination session.

12. All examinations distributed to students must be collected by the proctor and none may be retained by either the student or the proctor. If a student does not complete an examination, it still must be turned in to the proctor. Proctors should ensure that all answer sheets turned in by students are accompanied by the examination booklet. An answer sheets turned in without the examination booklet will be considered void.

13. All proctors must complete the Proctor Certification form in its entirety.