

MISSISSIPPI
CHAPTER
INTERNATIONAL
ASSOCIATION OF
ASSESSING
OFFICERS
HANDBOOK

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PREFACE

This chapter handbook has been prepared as an informal guide for the convenience of officers and committees of the Mississippi Chapter of the International Association of Assessing Officers (IAAO). Our chapter welcomes the opportunity and the participation of any interested persons in its activities.

Our chapter is a nonprofit, educational association. The purposes of the charter are the advancement of the objectives of IAAO in the state of Mississippi and such other purposes consistent there with, which may include the following: to promote uniform and equitable principles of assessment and collection through professionalism; to educate the public on the importance of the work performed by assessing and collecting officers; to improve assessment and collecting standards through education, modern methods of efficient technology; to promote professional designations through our candidate's club; and to better serve Mississippi taxpayers. Develop pragmatic leadership; improve the quality of local government by fostering an attitude to become pro-active, bound by public needs and not by political favors in solving problems; forge concerns about the enhancement of the quality of life throughout the state of Mississippi concerning jobs, education, economic opportunities and a constant increasing standard of living for all Mississippians; and to secure the future for tomorrow's generation.

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

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

**BYLAWS OF THE
MISSISSIPPI CHAPTER OF THE
INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS**

Article I. General Provisions

Section I.1 Name

The name of this organization is the Mississippi Chapter of the International Association of Assessing Officers, referred to hereinafter as, “the chapter.”

Section I.2 Jurisdictional Area

The chapter shall encompass a jurisdictional area consisting of all counties within the state of Mississippi

Section I.3 Purpose

The purposes of the chapter are the advancement of the objectives of IAAO in the state of Mississippi and such other purposes consistent therewith, which may include the following: to promote uniform and equitable principles of assessment and collection through professionalism; to educate the public on the importance of the work performed by assessing and collecting officers; to improve assessment and collecting standards through education and modern methods of efficient technology; to promote professional designations through our candidate’s club; and to better serve Mississippi taxpayers. Also to develop pragmatic leadership; improve the quality of local government by fostering an attitude to become pro-active, bound by public needs and not by political favors in solving problems; forge concerns about the enhancement of the quality of life throughout the state of Mississippi concerning jobs, education, economical opportunities and a constant increasing standard of living for all Mississippians; and to secure the future for tomorrow’s generation

Section I.4 Membership

Active membership in this chapter is open to all persona interested in assessment, collecting, and appraisal practice. However, only IAAO members (Must be Chapter and International) in good standing may *serve on the Executive Committee* and vote in chapter elections.

Section I.5 Membership Dues

Membership dues, independent of IAAO dues, shall be due on January 1st and delinquent after March 30th. If dues are not paid membership ceases *April 30th if a hearing is not requested in writing within 15 days of notification of President. The Chapter will strive to be fair and reasonable, taking into consideration all relevant facts and circumstances.*

Article II. Chapter Government

Section II.1 Governing Body

The governing body of this chapter shall be the Executive Committee. The Executive Committee shall be comprised of the following:

(1) President, (2) Vice-President, (3) Secretary, (4) Treasurer, (5) Executive Committee Position #1, (6) Executive Committee Position #2, (7) Executive Committee Position #3, (8) Executive Committee Position #4, (9) The State IAAO Representative, (10) Executive Director, (11) Immediate Past President

II.1a Officers

The officers of this chapter shall consist of the (1) President, (2) Vice-President, (3) Secretary, (4) Treasurer, (5) Executive Director, (6) Executive Committee Positions 1, 2, 3, and 4.

II.1b Powers and Duties of Chapter Officers

1. President: The President shall preside over all meetings, *shall, by written notice, inform a member of delinquency in dues, shall notify a delinquent member that membership will cease April 30th unless a request is submitted for a hearing within fifteen days, shall notify the Treasurer and Secretary of any member whose membership ceases for non-payment of dues* and shall appoint all committees subject to the approval of the Executive Committee.

2. Executive Director: The Executive Director shall be the chief assistant and technical advisor to the President in all affairs. The Executive Committee shall appoint the Executive Director. The Executive Director shall succeed to the office of President in the event of the death or resignation of the President.

3. Vice-President: The Vice-President shall perform all the duties of the President in the absence of the President. The Vice-President shall succeed to the office of President with the election of new officers of this Chapter.

4. Secretary: The Secretary shall prepare and keep a roll of all members, officers, and committee members of said chapter, and shall submit said roll to the executive director of IAAO *as required* each year; shall notify all members of the annual and regular meetings, and shall handle all correspondence to chapter members. The Secretary shall also keep accurate minutes of all meetings and shall send a copy of said minutes to the executive director of IAAO after approval by the Executive Committee. The Secretary also has additional duties under Sections *III.2a*, *IV.4*, *VI.1*, *VI.2*, and *VII.2*.

5. Treasurer: The Treasurer shall receive and account for all monies collected on behalf of the chapter, shall keep all books and financial records as instructed by the Executive Committee, shall regularly report to the Executive Committee the financial status of the chapter, *shall file all necessary tax returns, shall prepare and mail invoices to the membership for the annual Chapter dues no later than December 1st^h, shall notify the Executive Committee of any member whose dues are delinquent as of March 30th*, and shall prepare an annual financial report of the previous years receipts, disbursements, and balances to be submitted with the Secretary's annual report to IAAO.

6. Executive Committee Positions 1, 2, 3, and 4: These positions shall be part of the governing Executive Committee and shall assist other officers in administration of this chapter. (It is the intent of these bylaws that the Executive Committee Positions be comprised of the following: Position #1 shall be a member of the Mississippi Assessors and Collectors Association, [hereinafter referred to as MACA]. Position #2 shall be an employee of state or local government or an elected or appointed government official. Position #3 shall be from a non-government profession or enterprise. Position #4 shall be the Government Training Specialist (Mississippi State Extension Service).

7. Officers terms of office, with exception of Executive Director, will run from one annual meeting and continue service for 2 years to the annual meeting that year. However, each officer will hold such office until his or her successor is duly elected and qualified.

8. At the end of their term of office, all officers shall turn over all books and records to the incoming officers.

9. Any vacancies in officer positions, other than President, will be filled by the Executive Committee.

II.Ic Eligibility for Office

Eligibility for candidacy as an officer in this chapter shall be 1. IAAO member in good standing. 2. In addition, the candidate for President, Vice-President, and Executive Director must hold an IAAO professional designation, and/or be a current candidate for IAAO professional designation, or must hold a MAE Mississippi Assessment Evaluator designation, or must hold a Mississippi Real Estate Appraisers License. 3. Candidates for Executive Positions must comply with the provisions of Article II, Section II.Ib, Paragraph 6.

Article III. Nominations and Elections

Section III.1 Nominating Committee

The President of this chapter, subject to the approval of the Executive Committee, shall annually appoint five (5) members of this chapter to a nominating committee to select candidates for chapter offices. The committee shall be appointed no later than July 1st of each year and shall meet to select candidates no later than August 1st of that same year. *The committee shall select a candidate or candidates for each office.* The Nominating Committee shall be comprised as follows: One (1) member from MACA; One (1) member from the *Department of Revenue (DOR)*, (or other government agency should there be no current members from the *DOR*); One (1) member from a non-government profession or enterprise; Two (2) members at large. *At least three members of this committee will be IAAO members in good standing.*

Section III.2 Elections

III.2a Ballots

The Secretary shall be responsible for preparing and distributing election ballots to all voting members no later than September 1st of each year. The ballots shall list all candidates for office and shall provide for write-in candidates. The ballots shall be returned to the chapter President by the voting members no later than October 1st. The ballots shall be forwarded by the President to the nominating committee no later than ten (10) days prior to the annual meeting.

III.2b Election to Office

A plurality of the votes cast shall be sufficient for election to office. The nominating committee shall report the results of the vote count to the President no later than three (3) days prior to the annual meeting. In the event of a tie vote, the winner will be determined by placing each candidate's name on eleven (11) separate but identical pieces of paper and placing all twenty-two (22) pieces in a container. The *Executive Committee shall then each draw one piece of paper from the container.*

III.2c Posting of Results and Notification of Election

The President shall be responsible for notifying the candidates and the Executive Committee of the election results and for posting the results at the annual meeting.

Article IV Chapter Meetings

Section IV.1 Regular Meetings

The chapter shall hold an annual meeting of the membership at such time and place as determined by the Executive Committee. Additional regular meetings may be scheduled by the Executive Committee at the annual meeting.

Section IV.2 Special Meetings *of the Membership or Executive Committee*

Special meetings may be held on the call of the chapter President, or upon written request of at least six (6) members of the Executive Committee. Written notice of said meetings must be mailed *or emailed* at least two (2) weeks prior to said meeting.

Section IV.3 Quorum

For the purpose of transacting official business, a quorum shall consist of not fewer than *five (5) members of the Executive Committee and of 30 members in good standing at a membership meeting including at least five (5) members of the Executive Committee.*

Section IV.4 Notice

The chapter Secretary shall notify the chapter membership of regular meetings at least two (2) weeks prior to said meetings, and shall notify the Executive Committee of any special meetings at least two (2) weeks prior to said meeting. Said notice shall be in writing and delivered by United States mail *or emailed.*

Article V. Committees

Section V.1 General Provisions

There shall be standing and other such committees as are deemed necessary by the Executive Committee to carry out the objectives of the chapter. The chapter President shall appoint all committee members subject to the approval of the Executive Committee.

Section V.2 Standing Committees

The standing committees of this chapter are as follows:

1. Education Committee
2. Nominating Committee
3. Public Relations Committee
4. *Awards Committee*
5. *Audit Committee*

All committees are to have at least one (1) member from each category of membership. (i.e. one (1) from government, one (1) from MACA, and one (1) from private, professional, or enterprise) provided that there are sufficient members in all categories to all such.

Section V.3 Duties

1. All committees shall perform their duties in accordance with the chapter bylaws and the constitution of the association. All actions of the committees are subject to approval by the Executive Committee.
2. At the end of their committee term, all committee chairmen shall turn over all books and records to the incoming committee.

Article VI. Amendments to the Bylaw

Section VI.1 Amendments

The chapter bylaws may be amended upon the recommendation of the Executive Committee and subject to the approval of the membership as follows:

The chapter Secretary shall notify the voting members, by mail, at least two (2) weeks prior to the vote, and shall furnish to the membership copies of any proposed changes. The voting membership shall cast their vote for or against proposed changes at the annual meeting, at a meeting called for the purpose of amending the bylaws, *or by proxy vote by mail to the President at least 5 days prior to chapter meeting*. Approval of proposed amendments shall be by two-thirds of the votes cast by voting members.

Section VI.2 Approval by the IAAO Executive Board

All chapter bylaw amendments, after approval by the chapter members, shall be subject to the approval of the IAAO Executive Board. The chapter Secretary shall certify the amendment, and mail it to the Executive Director of IAAO within ten (10) days after approval by the chapter membership.

Article VII. Chapter Funds and Annual Report

Section VII.1 Chapter Funds

The funds of this chapter shall consist of a general operating fund. The Executive Committee shall instruct the chapter Treasurer as to the desired method for receipt and disbursement of the chapter funds, including the keeping of all records and books.

Section VII.2 Annual Report

The Secretary shall prepare an annual report of the previous year's meetings, finances, activities, and membership, and shall submit it to the Executive Board of IAAO *as required* each year. Said report shall include but not be limited to: the Treasurer's annual report, the previous year's activities, membership, and meetings.

MISSISSIPPI CHAPTER INTERNATIONAL ASSOCIATION
OF ASSESSING OFFICERS HISTORY

1988

December 8 The Mississippi Chapter of IAAO Bylaws were adopted in a business meeting by its members and submitted to the IAAO Executive Board for their approval prior to January 1,1989

1989

March The chapter was organized by approval of the IAAO Executive Board. There were 118 initial members.

December 7 A Candidate's Club was organized with 8 members. A quarterly newsletter, "Property Lines" was approved. An Educational Committee was formed.

Guy Dale Shaw received the McCarren Award for Representative of the Year and also the McCarren Membership Award at the International level.

A 3' x 6' banner was purchased for display at public functions.

Workshops were formed to help promote uniform and equitable principles of property assessments through professionalism and integrity.

1990

Guy Dale Shaw again received the McCarren Award for Representative of the Year and the McCarren Membership Award at the International level.

Johnny E. Riley received the International Public Information Program Award.

The Mississippi Chapter was nominated for the 1990 Outstanding Chapter Award and the 1990 Distinguished Research and Development Award.

1991

Awarded Outstanding Chapter Award

Awarded the Distinguished Research and Development Award for service by the Property Tax Bureau, Mississippi State Tax Commission and the Cooperative Extension Service at Mississippi State University

Guy Dale Shaw received the McCarren Award for Representative of the Year.

Robert M. Megginson was nominated for the International Harry Galkin Award.

1992

Guy Dale Shaw received the McCarren Award for Representative of the Year and the McCarren Membership Award.

The chapter filed an Articles of Incorporation as a nonprofit organization.

1993

Guy Dale Shaw received the McCarren Award for Representative of the Year.

Legislation was passed to provide compensation for professional designations through IAAO and also for licensed appraisers through the MS Real Estate Certification and Licensing Board.

1994

Robert M. Megginson received the McCarren Award for Representative of the Year.

Joe Young was chosen to serve as one of four "Governors" from across the United States for the Rural and Small Jurisdiction Council.

1998

The chapter received the International Distinguished Assessment Jurisdiction Award for the Property Tax Bureau, Mississippi State Tax Commission and the Center for Governmental Technology at Mississippi State University.

Chapter information accessible on the web

State chapter had 156 members and International had 87

Ed Cole, Joe Young and Robert Megginson served on International Committees.

1999

Guy Dale Shaw received the International Clifford B. Allen Most Valuable Member Award.

Joe B. Young received the International Member of the Year Award.

TIME TABLE OF IMPORTANT DATES

January 1-March 30	Dues are due
March 31	Membership ceases if dues not paid
July 1	Nominating Committee to be appointed
August 1	Candidates shall be selected
September 1	Ballots should be to voting members Secretary to submit roll of all members, Officers, and committee members to IAAO Secretary shall file annual report to Executive Board of IAAO
October 1	Ballots returned to President
At least 10 days prior to annual meeting the President shall forward ballots to Nominating Committee	
At least 3 days prior to annual meeting the Nominating Committee shall report results to President	
10 days after approval of Chapter bylaws the Secretary shall certify to IAAO Executive Director	

MISSISSIPPI CHAPTER OF IAAO OFFICER DUTIES

PRESIDENT: The President shall preside over all meetings, shall appoint all committees subject to the approval of the Executive Committee, shall forward ballots to the nominating committee no later than 10 days prior to annual meeting, shall notify candidates and the Executive Committee of election results, shall post results of election at the annual meeting, shall call special meetings, shall serve on the Finance Committee and nominating committee, and shall serve a 2 year term.

EXECUTIVE DIRECTOR: The Executive Director shall be the chief assistant and technical advisor to the President in all affairs and shall succeed to the office of President in the event of the death or resignation of the President. The executive director shall serve as Chair of Awards Committee.

VICE-PRESIDENT: The Vice-President shall perform all the duties of the President in the absence of the President, shall succeed to the office of President with the election of new officers of the Chapter, shall serve on the Finance Committee, shall serve 2 year term, shall serve as chair of education committee, and serve on finance committee.

SECRETARY: The Secretary shall prepare and keep a roll of all members, officers, and committee members, shall submit said roll to the executive director of IAAO by September 1 of each year, shall notify all members of the annual and regular meetings, shall handle all correspondence to chapter meetings, keep accurate minutes of all meetings, shall send a copy of said minutes to the executive director of IAAO after approval by the Executive Committee, shall be responsible for preparing and distributing election ballots to all voting members no later than September 1st each year, shall notify the voting members, at least 2 weeks prior to the vote, by providing copies of proposed changes to the bylaws, and shall prepare and submit an annual report of the previous year's meetings, finances, activities, and membership to the Executive Board of IAAO. Shall serve 2 year term and chair public relations committee.

TREASURER: The Treasurer shall receive and account for all monies collected on behalf of the chapter, shall keep all books and financial records as instructed by the Executive Committee, shall regularly report to the Executive Committee the financial status of the chapter, and shall prepare an annual financial report of the previous year's receipts, disbursements, and balances to be submitted with the Secretary's annual report to IAAO. The treasurer shall serve a 2 year term and serve on finance committee.

EXECUTIVE COMMITTEE: These positions shall assist the other officers in administration of the chapter and shall serve 2 year term.

IAAO REPRESENTATIVE: Serve as local liaisons to IAAO headquarters, report to headquarters about local events, meetings, educational needs, legislative initiatives and changes, personnel changes, concerns, new officers of local organizations, and retirements, and promote membership, professionalism, designation programs and serve on nominating committee.

Mississippi Chapter of the International

Association of Assessing Officers Committees

Executive: Composed of President, Vice President, Secretary, Treasurer, Executive Position 1, Executive Position 2 (Mississippi Department of Revenue), Executive Position 3, Executive Position 4 (Center for Governmental Training & Technology), Executive Director, Immediate Past President, State IAAO Representative. Elected bi-annually by the membership with exception of Executive Director and State IAAO Representative.

Education: Chaired by Vice President and shall include Executive Position 4. This committee shall pick IAAO courses, workshops, collector's courses and work with the Candidate's Club, Other educational duties may be assigned by the Executive Committee.

Public Relations: Chaired by the Secretary and shall include Executive Position 4. Shall be represented by the North, Central and Southern Districts as appointed by the President. This committee will work with the website and newsletter.

Nominating: Chaired by the Past President and shall include the President, the IAAO Representative and a member at large. Shall select candidates no later than August 1st.

Awards: Chaired by the Executive Director

Audit: Shall include a representative of the North, Central and Southern Districts. The Treasurer shall be an ex officio member. This committee will review the records twice a year and provide an annual report.

Finance: Composed of the President, Vice-President, and Treasurer. This committee is responsible for a yearly budget of \$10,000 for all workshops and meetings.

Notes: The President, Executive Director, and IAAO Representative are to be ex officio voting members of each committee. The chapter President shall appoint all committee members subject to the approval of the Executive Committee. All committees shall perform their duties in accordance with the chapter bylaws and the constitution of the association. All actions of the committees are subject to approval by the Executive Committee. At the end of their committee term, all committee chairmen shall turn over all books and records to the incoming committee.

Sample Membership Letter

March 4, 2011

Dear Assessing and Collecting Professionals:

The Mississippi Chapter of IAAO would like to invite you to join our newly revitalized state chapter. Our executive and education committees have just returned from a leadership and strategic planning retreat and we are ecstatic that we have reignited the State Chapter of IAAO. We have many exciting new plans. As long time members of the IAAO, we are writing to you because we know that you, like our fellow IAAO members, are interested in career advancement and professionalism. We are confident that we have the tools to help you accomplish both.

Our chapter is striving to improve the quality of leadership and assessing and collecting standards through education. We have previously offered biannual workshops as well as biannual one week courses. Newly reestablished in our association is a Candidate's Club. Its purpose is to promote and help candidates achieve professional designations. A mentoring program will be added in the near future. Collector workshops will also be added. We feel assured that with our current programs and the addition of new ones, we as tax professionals can better serve Mississippi taxpayers.

As an added incentive, the International Chapter is offering two years of membership for \$200. They have numerous benefits including: online discussion forums, free subscriptions to their respected publications, a premier library with research services, educational opportunities with the ability to earn a professional designation, and discounts on services.

The dues for state membership are \$10.00 yearly and members receive a discount at the biannual workshops. Make an investment in your career! Join the IAAO now!

Sincerely,

Mitzi Presley & Executive Committee
Mississippi Chapter IAAO

Enclosures: Mississippi Chapter Membership Application
International Association Membership Application



**MISSISSIPPI CHAPTER OF
INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS
NEW MEMBERSHIP APPLICATION**

Membership effective year _____

Name	Title
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Employer/County/Firm

Office Address

Office Phone	Office Fax	Office E-Mail
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Home Address

Home Phone	Home Fax	Home E-Mail
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Signature	Date
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After becoming a member, Mississippi Chapter IAAO membership dues of \$10.00, independent of IAAO dues, shall be due annually on January 1st and delinquent after March 30th. If dues are not paid membership ceases April 30th if a hearing is not requested in writing within 15 days of notification of President.

Are you a member of the International Association of Assessing Officers? _____

If not and you would like to become a member of the International Association of Assessing Officers you can go to <http://www.iaao.org> to download a membership application.

**\$10.00 application fee payable to MS Chapter IAAO should be returned to:
Ramona Blackledge
MS Chapter IAAO Treasurer
P.O. Box 511
Laurel, MS 39441**



INTERNATIONAL ASSOCIATION of ASSESSING OFFICERS

Join IAAO
and register for
seminars at the
reduced member
rate!

IAAO MEMBERSHIPS

Regular Membership

is available to: all officers, officials, and employees of a governmental authority or jurisdiction who have any or all of their duties related to property valuation, property tax administration, or property tax policy; all persons engaged as individuals, or employees of an organization, who exclusively spend their time to provide professional services to governmental officers, officials, or offices of a governmental authority or jurisdiction in support of the property valuation, property tax administration, or property tax policy functions. Professional services do not include the providing of hardware, software, equipment or the sale of either goods or services to governmental agencies.

Associate Membership

is available to: all officers, officials or employees of governmental agencies who do not have any duties directly involved in property valuation, property tax administration, or property tax policy; all officers, administrators, employees and enrolled students of educational institutions; individuals involved in or interested in property valuation, property tax administration, or property tax policy; any member of any organization, group, or association, whether local, regional, national, or international, interested in property valuation, property tax administration or property tax policy.

Affiliate Membership

is open to groups or associations of public officials, employees or citizens interested in property valuation for property tax purposes, property tax administration and property tax policy. For application and information please contact: membership@iaao.org.

Dues are payable in advance.

Please complete this application and return with payment of dues: If paying by credit card, please provide the information requested below and fax to 816/701-8149.

TOTAL MEMBERSHIP DUES

\$ _____

For information about an accredited membership designation, go to www.iaao.org.

VISA Cardholder Name (Print) _____

MasterCard _____

AMEX Card Number Expiration Date

If paying by check, please make check payable to IAAO in U.S. Funds and mail to: IAAO, PO Box 29900 Dept. 929, Phoenix, AZ 85038-0900 (The returned check charge is \$25.00)

Name _____ Title _____

Jurisdiction/Firm _____

Office Street Address _____

Office City _____ Office State/Province/Country _____ Office ZIP/Postal Code _____

Office Phone _____ Office Fax _____ Office E-mail _____

Home Street Address _____

Home City _____ Home State/Province/Country _____ Home ZIP/Postal Code _____

Home Phone _____ Home Fax _____ Home E-mail _____

Send mail to: Office Home Check here if you do not do not wish to receive membership e-mails.
E-mail is a vital link between IAAO and it's members. It is IAAO policy not to sell, rent, or distribute e-mail addresses.

Person referring applicant (if anyone) _____ Check here if you are an elected official.

I hereby apply for membership in the International Association of Assessing Officers and agree to comply with the requirements of the IAAO Code of Ethics and Standards of Professional Conduct. If accepted for membership, I will abide by the IAAO Constitution, pay the established dues, and comply with the Code and Standards.

Signature _____

Date _____

Please indicate if you have been convicted of a felony or crime of office which may reflect on your ability to abide by the IAAO Code of Ethics and Standards of Professional Conduct. Yes No

Office use only:
W91ZZ

Proration Schedule

Prices are quoted in US dollars and are subject to change. Prices are guaranteed through 12.31.13

Date Application Received	January - March	April - June	July - September	October - December
Regular Member	\$175.00	\$131.25	\$87.50	\$175.00
Associate Member	\$180.00	\$135.00	\$90.00	\$180.00

****Join in the 4th quarter and don't pay again until Jan. 1, 2015. Enjoy as much as 3 months free**

Special Interest Areas

(you may join more than one at **no** additional charge)

- Public Utility Section Mapping and GIS Section
- Computer Assisted Appraisal Section Personal Property Section
- Tax Collection Section

Questions? Call 800/616-IAAO



Some of the membership benefits you will enjoy include:

- Networking with your peers
- Discounts on IAAO meetings and publications
- AssessorNET—an online discussion forum
- IAAO Research Library
- Fair & Equitable—IAAO's monthly magazine
- Internationally recognized professional designations

OATH OF OFFICE

I, (YOUR NAME), DO HEREBY AGREE TO UPHOLD THE
CONSTITUTION OF
THE INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS AND
ITS BYLAWS
TO THE BEST OF MY ABILITY IN DISCHARGING MY DUTIES AND
RESPONSIDILITIES TO THE OFFICE OF WHICH I HAVE BEEN
ELECTED;
AND
I FURTHER HEREBY AGREE TO ABIDE BY THE ESTABLISHED
INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS CODE OF
ETHICS AND
STANDARDS OF PROFESSIONAL CONDUCT. SO HELP ME GOD!

[CONGRATULATIONS]

IAAO LOGO



The federal registration symbol © must be used in connection with the IAAO logo unless it is not possible to do so. The IAAO logo may only be used to identify a member in good standing of the Association or a product or service of the Association.

The logo may not be used in direct connection with or as part of an assumed business name or business logo, except by express written permission of the Association.

The logo may be printed in any color or combination of colors on any background.

The logo may be reproduced in any size, except that it should never be reduced to the point where the registration symbol © is illegible.

IAAO BOOTH and MATERIALS

IAAO BOOTH

An IAAO booth is available to use at meetings to display IAAO materials. The booth is available free to chapters on a first-come, first-served basis. To reserve a booth, call David Wayne Reed at 800-616-4226 six weeks prior to your meeting. We recommend that you procure a table to display additional materials in front or to the side of the booth.

Please return the booth by UPS ground. A return shipping document will be included in the booth for your easy return.

IAAO MATERIALS & BANNER

To receive IAAO materials for display, simply call David Wayne Reed at 800-616-4226. We will send you any materials you need free of charge.

If you would like to make a grab bag of promotional material for meeting guests, just call the IAAO and we can give you some ideas. Pens, notepads, pad/pen combos, rulers are available free of charge. Other items, such as t-shirts and hats are available at cost.

The IAAO Banner may be used at any chapter meeting and can be borrowed from the IAAO office free of charge. To reserve a banner, call the IAAO Chapter staff member at 800-616-4226 six weeks prior to your meeting. IAAO Banners are also available for sale (at cost) for \$35 +\$3 shipping.

IAAO REPRESENTATIVES

IAAO Representatives

What are IAAO Representatives?

Your IAAO Representatives are the local liaisons to IAAO headquarters. They have two major areas of responsibility: communication and marketing.

As the communication link in our organization, Representatives are responsible to both the local membership and headquarters. Headquarters wants to know what its members are doing and what they want from the organization. To this end, the Rep will tell headquarters about local events, meetings, educational needs, legislative initiatives and changes, personnel changes, new officers of local organizations, retirements, and similar activities. They will also let headquarters know what people in our profession are concerned about and what IAAO might do to help. Locally, they will communicate what is going on at headquarters.

As IAAO's marketing force, they promote membership, professionalism, and our designation programs. They have access to booths and printed materials for your meetings, as well as videos and presentations about our profession, and are prepared to give speeches to promote IAAO's goals and mission.

How Are Reps Selected?

The Chapter or IAAO President appoints all Representatives for one year. This is an awesome task, and many local chapters make recommendations. Each President uses his or her own discretion, but chapter recommendations are traditionally given great weight. The President should make appointments of Representatives prior to the IAAO Annual Meeting. Therefore, chapters should make recommendations to the President-elect by June 1.

Representatives are appointed for each state, Canadian province, and country other than the United States and Canada. In addition, each state, province, and country is part of a geographic region with an Regional IAAO Rep. If you don't know your region, please call headquarters or your Rep. We'll do our best to answer your questions.

What can an IAAO Representative do for the Chapter?

Your Rep can help you schedule education, can write a column for your newsletter, can promote IAAO at your meetings, and can help you communicate with headquarters. The more you involve your Reps in your chapter activities, the more assistance you are likely to receive from them.

LOCAL ACTIVITY GRANT

Local activity grants are available to members to help them form an IAAO chapter, conduct a membership campaign for their IAAO chapter, or advance the IAAO's educational, professional, or research goals.

Types of Programs to be funded:

- Start up money for chapters, candidates' clubs, new educational programs, or new newsletter. IAAO promotional activities
- Curriculum development
- Career day presentations
- Distribution of IAAO promotional literature
- The proposed program may benefit associate members and non-members as long as the primary focus meets the criterion listed above.
- The proposed program may not be a dues reduction or rebate program.
- The panel awarding local activity grants is composed of the Vice-President, an Executive Board member, and a member of the Awards Subcommittee of the Outreach Committee.

The panel will process all applications and will make a determination within thirty days of receipt of the application by the Executive Director.

A copy of the application shall also be filed with the IAAO Representative for the area.

The application shall state the reason for the requested funding, the benefits to the association, and the program success measures.

An IAAO regular member, a chapter, or an affiliate member must submit the application.

Only one (1) grant shall be awarded, within the first half of the association's fiscal year to any one country, state, or province. This restriction shall not apply during the second half of the fiscal year. If all monies budgeted for these grants are awarded within a fiscal year, the unfunded applications will be held to the following fiscal year. These unfunded grants shall receive priority over new applications.

The Executive Director shall review all awards for funding on the basis of merit and the date of receipt.

Monitoring of Grants

Within thirty (30) days of completion of a program, the recipient is required to file a report on the funded program. The report is to be filed with the Executive Director, who shall forward the report to the Local Activity Grant Panel and the local IAAO Representative for review.

SAMPLE PRESS RELEASE

Date
Contact:
Your name, title
Address
Phone Number

FOR IMMEDIATE RELEASE

Local Assessment Officer Earns Award

Name of Town- (Name of award winner) has won the (name of award) of the International Association of Assessing Officers (IAAO). The award is presented to (see IAAO Programs and Publications Catalog for description of awards). (Name of award winner) is a (title) with the (name of employer).

The International Association of Assessing Officers (IAAO) is a nonprofit, educational association. Its mission is to provide leadership in accurate property valuation, property tax administration, and tax policy throughout the world. The IAAO offers courses, workshops, and seminars, performs research, and provides technical assistance. The IAAO's members subscribe to a Code of Ethics and Standards of Professional Conduct and to the Uniform Standards of Professional Appraisal Practice.

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

(###)

LOBBYING

IAAO POLICY STATEMENT CONCERNING APPRAISER CERTIFICATION LEGISLATION AND LOBBYING

The International Association of Assessing Officers (IAAO) is a nonprofit, educational association. Its mission is to provide leadership in accurate property valuation, property tax administration, and tax policy throughout the world. The IAAO offers courses, workshops, and seminars, performs research, and provides technical assistance. As a means of achieving that purpose, IAAO supports the passage of any legislation designed to improve the qualifications and standards of those persons engaged in property appraisal since those appraisals directly affect the assessment and taxation of property.

However, because IAAO is an organization exempt from taxation under Internal Revenue Code section 501(C) (3), it cannot participate in the drafting of or the lobbying for passage of proposed federal, state, or local legislation. IAAO and its members may engage in the following activities that the Internal Revenue Service has stated are not lobbying:

1. Making available the results of nonpartisan analysis or research.
2. Providing technical advice or help (that would otherwise be influencing legislation) to a government body, committee, or other subdivision in response to a written request by that group.
3. Appearing before, or communicating with, a legislative body about its possible decision that might affect the organization's existence, powers, duties, tax-exempt status, or the deduction or contributions to the organization.
4. Communicating with a government official or employee who is not a member or employee of a legislative body, unless the main purpose of the communication is to influence legislation.
5. Communications between the organization and its members about legislation or proposed legislation that directly interests the organization and its members unless the communication directly encourages its members: (a) to influence legislation or (b) to encourage nonmembers to influence legislation.



DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
CINCINNATI OH 45999-0023

Date of this notice: 06-03-2011

Employer Identification Number:
32-0344371

Form: SS-4

Number of this notice: CP 575 F

For assistance you may call us at:
1-800-829-4933

IF YOU WRITE, ATTACH THE
STUB OF THIS NOTICE.

006689.877331.0024.001 1 MB 0.390 692



MISSISSIPPI CHAPTER INTERNATIONAL
% MITZI PRESLEY
PO DRAWER 636
ABERDEEN MS 39730



16689

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 32-0344371. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear off stub and return it to us.

Assigning an EIN does not grant tax-exempt status to non-profit organizations. Publication 557, Tax Exempt Status for Your Organization, has details on the application process, as well as information on returns you may need to file. To apply for formal recognition of tax-exempt status, most organizations will need to complete either Form 1023, Application for Recognition Under Section 501(c)(3) of the Internal Revenue Code, or Form 1024, Application for Recognition of Exemption Under Section 501(a). Submit the completed form, all applicable attachments, and the required user fee to:

Internal Revenue Service
PO Box 12192
Covington, KY 41012-0192

The Pension Protection Act of 2006 contains numerous changes to the tax law provisions affecting tax-exempt organizations, including an annual electronic notification requirement (Form 990-N) for organizations not required to file an annual information return (Form 990 or Form 990-EZ). Additionally, if you are required to file an annual information return, you may be required to file it electronically. Please refer to the Charities & Non-Profits page at www.irs.gov for the most current information on your filing requirements.

CHAPTER INCORPORATION

Chapter Incorporation by James A. Follina, Mgr., Ratio Study, Missouri Tax Commission

The International Association of Assessing Officers urges all local chapters to incorporate under the laws of their respective states or provinces. Two principal reasons for local chapters to incorporate are the limited liability or insulation of the individual chapter members against any debts or liabilities of the local organization and the decreased likelihood of the IAAO being liable for the actions of the local chapter. In many jurisdictions, individual Members of unincorporated groups can be held liable for the actions of the group; members of incorporated groups generally cannot. Also, it is less likely that the International Association of Assessing Officers can be held liable for the actions of an incorporated chapter as compared to an unincorporated one.

A local IAAO chapter can be considered a professional, nonprofit organization. Most states provide for incorporation under “not-for-profit” statutes or laws (as opposed to business corporation status). The requirements for incorporation under the “not-for-profit” statutes vary from state to state. However, all states require the applicant to furnish the state office with a statement of the organization’s purposes and objectives. In addition, statements regarding the activities, limitations, and operations of the organization must be made. When incorporating, the chapter or association must use its official name.

For illustration, follows is a summary of some of the basic incorporation requirements for Missouri. Both Missouri chapters, the Kansas City Chapter and the St. Louis Chapter, are incorporated. Under Missouri law, a “not-for-profit” corporation is defined as follows:

“a corporation no part of the income or property of which is distributable to its members, directors or officers, provided, however, that the payment of reasonable compensation for services rendered and the making of distributions not representing pecuniary profits or gains upon dissolution or final liquidation, as permitted by this chapter, shall not be deemed a distribution of income or property.”

Each state or province will have its own incorporation process and requirements. However, many requirements will be similar. Following are some of the basic requirements in Missouri.

- (1) The law requires a minimum of three (3) incorporators who must be natural persons, age 18 or older, and citizens of the United States.
- (2) There must be at least three (3) directors, and the Articles of Incorporation must designate a fixed number of directors for the original board of directors.
- (3) Each corporation must have at least a president, vice-president, secretary, and treasurer. The president and secretary may not be the same person.
- (4) The article listing the purpose of the corporation must state at least a one-sentence definition of the purpose for which the corporation is organized. If desired, the statement may include: “and all other legal powers permitted General Not-for-Profit Corporations.”
- (5) The forms must be submitted with original signatures and seals on one copy, and those signatures must be originally notarized.
- (6) Each corporation must appoint and maintain a registered agent and office in Missouri.
- (7) All Missouri corporations must file an annual report each year in the Office of the Secretary of State, listing the officers and directors.

In discussions with representatives of the Secretary’s Office, emphasis was placed on compliance with the last two items noted above. Each corporation must keep current the information regarding the registered agent. Any information sent to the corporation by the Secretary’s Office is sent to the registered agent. The annual report is also due by July 31. A corporation may not remain in good standing if compliance with either of these two requirements is not met.

Normally the process of filing the incorporation papers with the appropriate state agency is not complicated or expensive. Currently in Missouri, there is a fifteen dollar (\$15.00) incorporation fee. However, this fee will vary from state to state.

Although the services of an attorney may not be required in the incorporation process, it may be advisable for a chapter to have an attorney review and discuss the benefits and disadvantages of incorporation.

Guidelines for Chapter Meetings

Guidelines for Chapter Meetings

by Robert M. Megginson, Property Tax Bureau, Mississippi Tax Commission, Jackson, Mississippi

The International Association of Assessing Officers' "Procedural Rules" adopted by the IAAO Executive Board provides a format for local chapter meetings.

These steps are listed in the attached "Chapter Rules and Regulations" of this Handbook under section 12.2.7-12.2.7.8

The "Sample Chapter Bylaws" portion of this Handbook expands on the above sections in regard to such activities as: regular meetings, special meetings, quorum, and meeting notices.

A sample of an agenda for a Membership Meeting is provided below. along with a sample of the minutes of a regular Membership Meeting and an Executive Committee Meeting of an IAAO Chapter.

Robert's Rules of Order (The VERY abbreviated version.)

1. What:

- The proper parliamentary process by which governing bodies run meetings.

2. Why:

- (1) To ensure fairness and equity.
- (2) So that the minutes can accurately reflect the issues, actions and decisions made.
- (3) To ensure that future leaders of the organization have accurate documentation on the activities of the previous committee.
- (4) To ensure that by laws and other legal codes are adhered to.
- (5) So that decisions and actions taken can be justified or defended if needed.
- (6) To streamline the meeting, maintain focus and order, and ensure items not germane to the issues at hand are kept in check, and out of the record.

3. Roles:

(1) Chair:

- To help facilitate the meeting.
- To keep order.
- Make rulings on points of order, points of information, or points of procedure.
- The chair generally remains neutral, but can vacate the chair if the chair wishes to weigh in on a particular side of an issue.
- The chair can not make a motion, but may prompt for one from the members if it is evident a motion is needed.
- To clarify and restate pending motions for which a vote is in order.
- Can vote on an issue if that vote would impact the outcome.

(2) Vice Chair:

- To help facilitate the meeting.
- To help keep order.
- Takes the chair if the presiding chair wishes to vacate on an issue or if the presiding chair is absent.

- Can make motions and has full voting rights.

(3) Secretary:

- To accurately record the facts of the meeting for future use.
- To note all motions and their results. The minutes should not contain discussions of motions.
- To present and post minutes of the meeting and keep past minutes filed for future reference.
- Is next in line to fill the chair in the absence of the presiding chair or vice chair.

(4) Committee Members:

- To own the meeting.
- To make, discuss, amend and vote on motions germane to the agenda.
- To ensure the actions taken and motions passed represent the needs and requests of the membership at large.
- To uphold the by laws.

4. Robert's Rules of Order provide a foundation for the entire process of a meeting, from preparation to conclusion.

5. Agenda:

- Everyone can participate in the development of the agenda. Suggest topics or issues that you feel need to be covered.

- When ever possible, the agenda should be sent out prior to the meeting.

- Agenda should be organized as:

- (1) Call to order
- (2) Read and approve minutes
- (3) Reports of officers and standing committees
- (4) Reports of special committees
- (5) Special orders
- (6) Unfinished business
- (7) New business
- (8) Adjourn

6. Reports:

- Reports should be prepared ahead and copies brought. Or if possible, distributed to members prior to the meeting especially if they are of great length, or constitute a motion that will require a vote.
- Reports should be as clear and succinct as possible. Committee reports should not be a rehash of the committee meeting, but should contain dot points of what was done. Recommendations from standing or special committees should be made in the form of a motion. These motions do not require a second.

7. Discussion Items:

- During a discussion (or debate) a member may call for any of the following.

All of these permit interruption of the speaker.

- (1) Point of order. Is a request that the rules be followed. It may be in regard to parliamentary procedure, by laws, codes or decorum and is ruled by the chair.
- (2) Point of information. Allows a member to ask a question about the business at hand and is usually a point of clarification. This may be responded by the chair or referred to a member who can make a clarification.
- (3) Call for the orders of the day. Is a request to return to the matter at hand. Usually asked for when the discussion has strayed from the agenda or from the motion on the floor. Anyone can call for the orders of the day; it does not have to be the chair.

8. For a discussion to be effective there are some rules of decorum that should be followed.

- (1) Speak when called on.
- (2) Direct comments to the chair.
- (3) Don't be disruptive.
- (4) Make corrections if you know something is inaccurate. Of course do it politely.
- (5) Allow the chair to interrupt you. However, do not interrupt others unless calling for one of the items listed above.

9. Discussion Items that require a vote:

- Items that bring up a question of "what shall we do?" require a motion and a vote. These items need to follow a process.

- (1) Presentation of item
- (2) Motion made and seconded
- (3) Discussion
- (4) Restatement of the motion
- (5) Vote
- (6) Move on to next item

- While a motion is on the floor may be amended. However, the amendment must be germane to the main motion presented.

- During a discussion (or debate) members may also want to make one of the following motions. (These motions do not allow interruption of the speaker.)

- (1) Lay on the table definitely. This puts the motion on the floor aside for the moment and sets a definite time to bring it back to the floor.
- (2) Lay on the table indefinitely. This kills the motion.
- (3) Refer to committee. This puts the motion aside and asks that a committee do some research and come back with a proposal.

- Voting can be done in any number of ways. For our purposes, we will use one of 2 methods.

- (1) "If there are no objections". This will be used for approval of minutes or other topics where there seems to be no one opposed to the motion made.
- (2) "Those in favour - Aye. Those opposed - No". This will be used when a majority vote is needed, and there may be opposition to the motion.

- The chair may vote if the vote will affect the outcome, or if the chair has relinquished the chair.

IAAO Executive Agenda
April 26, 2011
Starkville, MS

Welcome

Call to order

Minutes - Rhonda Reno

Treasurer's Report - Ramona Blackledge

Additional Reports - Gerald Barber – Education

Old/Unfinished Business-Chapter papers

 Old records

 Committee member terms

New Business-Mentor program ideas

 Recognition of IAAO Certificate recipients

Other Business- Important dates

 Officer duties

 Chapter history

 Utah Chapter contact

 Workshops and Schools update

Adjourn

IAAO CURRICULUM

IAAO Course Descriptions

Courses: Thirty hours of instruction and a final examination.

Course 101 - Fundamentals of Real Property Appraisal

A basic appraisal course for assessors, course 101 emphasizes the theory and techniques of the cost and sales comparison approaches to value. Students review terminology, basic appraisal and economic principles, general principles of land valuation, the assessment function, and the mass appraisal process. Recommended: PAV/PAAA

Course 102 - Income Approach to Valuation

Covers the theory and techniques of estimating value by the income, or capitalized earnings, approach. The material includes selection of capitalization rates, analysis of income and expenses to estimate operating income, and capitalization methods and techniques. This course also covers rental units of comparison, as well as real estate finance and investment. Recommended: Course 101, PAV/PAAA

Course 112 - Income Approach to Valuation II

A continuation of introductory course 102, this course emphasizes advanced concepts in the income approach to value. Application of the compound interest tables in appraisal practice is taught. Comparison of the various capitalization methods and techniques is covered by lecture and problem solving. This course presents in detail the contemporary capitalization methods of mortgage equity and discounted cash flow analysis.

Recommended: Course 101, 102, PAAA

Course 122 - Assessment and Appraisal Institute

The Assessment and Appraisal Institute provides intensive two-week instruction on the principles and practices of real property appraisal as contained in IAAO Course 101, course 102 and The Appraisal Foundation's Uniform Standards of Professional Appraisal Practice (USPAP). It is designed to provide appraisal knowledge and skills in a highly concentrated format. The normal two and one-half week, three-course sequence is available in this two-week format. Recommended: PAAA/PAV

Course 201 - Appraisal of Land

Course 201 covers the theory and techniques of appraising land. Topics include classifying land; estimating highest and best use; discovering significant trends and factors and their effects on value; data collection; and selection of correct physical units of land measurement for appraisal. The five land appraisal methods (sales comparison, allocation, anticipated use, capitalization of ground rent, and land residual capitalization) are studied in depth.

Recommended: Course 101, 102, PAV/PAAA

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, 102, MARP

Course 310 - Applications of Mass Appraisal Fundamentals

This residential and commercial application course builds on the theories and concepts taught in Course 300. It utilizes case studies for the demonstration of key concepts in a real-world setting. The course will provide the student with practical application of the tools and techniques presented in Course 300. Recommended: Course 300, MARP

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, MARP

Course 312 - Commercial/Industrial Modeling Concepts

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

Course 320 - Multiple Regression Analysis

Course 320 is an introductory offering designed to provide you with intensive training in the application of Multiple Regression Analysis (MRA). The course is built in a Windows™ environment and uses the statistical software SPSS for demonstrations. Course 320 starts by introducing you to the basic functions necessary to analyze a database. Learn how to develop frequency distributions, cross-tabulations, averages, etc. You will learn how to use various graphs to display the results of your analysis. You will also learn how to develop an additive multiple regression model using stepwise regression. Along with developing the model, you will learn what regression statistics mean and how to interpret them. Later you will test the results of the model once it has been developed. You will also be taught how to use the MRA to calibrate a cost model market. Recommended: MARP

Course 322 - Application of Residential Modeling Concepts

Course 322 provides students a hands-on computerized learning environment for developing and using automated valuation models (AVM's). Using window based statistical software package students will work in computer labs each day developing and exploring computer applications for the cost and sales comparison approaches to value. Analysis includes the use of summary statistics, cross tabulation reports, scatter plots, box plots and curve fitting functions. Students will learn how to develop appropriate adjustments for location, size of structure, quality grade and depreciation. The 3 basic model structures, additive, log-linear and hybrid will be developed and calibrated with techniques like MRA, non-linear MRA and Feedback. All valuation models are measured against the performance standards in the IAAO Standard on Ratio Studies. Spatial Analysis and Response Surface location adjustments are introduced in this course. Those attending will learn better ways to explain and defend the mass appraisal models. Recommended: Course 300, 311 and or equivalents, MARP

Course 400 - Assessment Administration

Course 400 covers administrative concepts and procedures that can produce greater efficiency in the modern assessment office. Students explore the key subsystems of an organization and how to operate them more effectively. Also included is the manager's role within an assessment organization: the processes of planning, directing, coordinating, organizing, budgeting, and evaluating toward the better utilization of human and physical resources. Topics include information systems, reappraisal, setting goals and objectives, maintenance, appeals, data processing, public relations, personnel, budgeting, report reviews, ratio studies, evaluations and standards of

practice. Recommended: Course 101, and The Appraisal Foundation's Uniform Standards of Professional Appraisal Practice (USPAP), PAAA

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.

Course 500 - Assessment of Personal Property

Course 500 provides a comprehensive program of study for those who assess personal property for ad Valorem tax purposes. After a review of property tax administration and the nature of value, the following aspects of personal property assessment are covered: categories of personal property, discovery, the valuation process, valuation guidelines and quality control, depreciation methods, and special problems. Recommended: PAV

Course 600 - Principles and Techniques of Cadastral Mapping

Course 600 serves as an introduction to property ownership mapping with an emphasis on the preparation and use of assessment maps. Topics covered include ownership data gathering, map sources, mapping equipment, base maps, conveyances, acreage calculation, mapping administration, and parcel identification systems. A comprehensive set of case problems covering the metes and bounds survey system and the rectangular survey system is included in the course material. Recommended: Course 101, PAV

Course 601 – Cadastral Mapping: Methods & Applications

Course 601 provides a comprehensive program of study, applying the knowledge and abilities taught in course 600 on a more advanced level. A comprehensive set of case problems is utilized to enhance your learning experience.

Workshop Descriptions

Workshops: Various hours of instruction with optional examinations.

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. IAAO recertification credit: 15 hours-2 days

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

This workshop covers materials from The Appraisal Foundation, Uniform Standards of Professional Appraisal Practice which includes: Definitions, Preamble, Ethics Rule, Competency Rule, Departure Rule, Jurisdictional Exception Rule, Supplemental Standards Rule, and Standards 1 through 10. Supplementary materials include The Appraisal Foundation Uniform Standards of Professional Appraisal Practice (USPAP) Frequently Asked Questions. The FAQ is an annually updated reference for appraisers and users of appraisal services that contain a compilation of questions and answers. Case studies and exercises illustrate the material. This workshop includes an exam. IAAO recertification credit: 15 hours-2 days IAAO recertification credit: 15 hours-2 days

Workshop 152-Residential Demonstration Appraisal Preparation

This workshop reviews the requirements and procedures for an IAAO Residential Demonstration Appraisal. The workshop covers each section of a successful demonstration report, data requirements for demonstrating proper applications, procedural requirements, analytical methods for deriving market support for conclusions, how to organize the appraisal and writing processes, and how successfully to address items required by the IAAO Grading Committee. Recommended: Course 101,102. IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 153 – Introduction to Income Approach to Value

This workshop is designed both for new assessors and appraisers who have not had previous exposure to income approach valuation methods, and for experienced appraisers who seek a refresher course in income approach valuation methods. The workshop covers the investment aspects of real estate, the analysis of expenses and income, and the development and use of capitalization rates. An extensive set of case problems and demonstrations help the student develop an understanding of each of these topics and is a good introduction to our advanced income workshop, Contemporary Capitalization Methods and Techniques, and to Course 102: Income Approach to Valuation. Recommended: Course 101. IAAO recertification credit: 21.5 hours-3 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. Recommended: Course 101. IAAO recertification credit: 15 hours-2 days

Workshop 159 - Market Analysis for Income Valuation

In this workshop, participants will learn to: Develop and calibrate a useable and flexible income model; understand many of the rent, vacancy and expense variables; analyze different leases; analyze market data; conduct proper vacancy and collection create research; analyze income and expense statements; understand the uses of and differences between capital improvements, allowable maintenance expenses, reserves and deferred maintenance and understand how to evaluate a discounted cash flow analysis and compare it to a direct capitalization calculation. This workshop includes and exam. IAAO recertification credit: 15 hours 2 days

Workshop 161 - Marshall & Swift Cost Approach (Residential)

This workshop provides an understanding of how to utilize Marshall & Swift Residential Cost manuals. Several case studies are used to enhance the ability to apply this information. IAAO recertification credit: 7 hours–1 day

Workshop 162 - Marshall & Swift Cost Approach (Residential)

This two-day workshop is designed to teach participants how to utilize the Marshall & Swift Residential Cost Manual. Day one of this class is exactly the same as 161 (listed above). Day two gives an overview of segregated-cost and how to use segregated-cost, along with various example problems. IAAO recertification credit: 15 hours–2 days

Workshop 163 - Marshall & Swift Cost Approach (Commercial)

This workshop is designed to teach participants how to use the Marshall & Swift Commercial Valuation Guide. Participants will spend more time working several case study problems to assist them in learning how to apply this service. 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 191 – Uniform Standards of Professional Appraisal Practice Update (National)

This workshop is the National 7-hour USPAP Update offered for continuing education for licensure and certification through The Appraisal Foundation. The workshop provides a general overview of USPAP guidelines, advisory opinions, statements, and other appraisal practices. The course is updated yearly to address changes to USPAP and common misunderstandings. IAAO recertification credit: 7 hours-1 day

Workshop 250 - Introduction to Mine and Quarry Valuation

In this workshop, participants will learn to apply the three approaches to value to mineral properties. The differences between mining properties and other properties are analyzed. Sources of information for discount rates used in the income approach, and economic and functional obsolescence used in the cost approach are examined. Various mining techniques will be explained and related to actual appraisal problems. IAAO recertification credit: 15 hours-2 days

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. Recommended: Course 101, 102. IAAO recertification credit: Workshop 251: 7.5 hours-1 day. Workshop 252: 15 hours-2 days

Workshop 352 - Computer-Assisted Mass Appraisal Feedback

This workshop is for the student with advanced CAMA model-building skills and a good background in statistical analysis. It combines lectures and labs (hands-on) and also deals with case studies. Subjects include relevant background on feedback (adaptive estimation procedure, or AEP)--what it is, how it works, how it came about—and the feedback loop and the problems that have been encountered with it. There is a thorough discussion of feedback implementation: table design, selection of damping factors and starting coefficients, iteration patterns, termination criteria, and the resulting equation. Feedback is compared statistically with other techniques. Recommended: Course 101, 102. IAAO recertification credit: 21.5 hours-3 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.

Recommended: Course 101. IAAO recertification credit: 11 hours-1 ½ days

Workshop 359 - Utilizing SPSS

SPSS is a comprehensive system for analyzing assessment data. SPSS software is one of the most popular software packages used in the valuation process. Participants will learn how to download and analyze data, generate: tabulated reports, charts and plots of distributions and trends, descriptive statistics and complex statistical analyses. This workshop is designed to assist the participant in understanding how to utilize SPSS software to enhance their job performance. Recommended: Course 101, 300. IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 403 - Property Tax Policy, Alternatives & Modules

This workshop is customized from IAAO Course 402 (Property Tax Policy) and includes topics from modules 1, 5, and 7 of that course. The topics include understanding public and private sector roles, how state and local governments raise revenue, examples of tax abatements and California type controls, and roles of property tax assessors in policy; reviewing issues related to other taxes and contrasting their use, strengths, and weaknesses with those of property tax; describing features of a model assessment and property tax system; explaining budget and rate driven systems, state and local roles, advantages and disadvantages of current market value as a base for property tax, exemptions and controls on property tax; and discuss major legal issues involved I property tax.

Workshop 450 - Principles of Property Assessment

Principles of Property Assessment is an introduction to the responsibilities of assessors and the methods used to fulfill those responsibilities. Although this workshop will not equip students to carry out the role of the assessor, it will acquaint them with the basic knowledge needed to assess property. Some of the topics addressed are the functions of the assessor, the property tax, the nature of value, the appraisal process, mapping, property record data development, assessment-sales ratio studies, personnel development, and public relations. IAAO recertification credit: 18.5 hours-2 ½ day

Workshop 451 - Planning an In–House Revaluation Program

Designed primarily for administrators at the local level, this workshop addresses the fundamental tasks in planning and organizing the in-house revaluation program. The material covers the evaluation of existing resources, creation of appraisal standards, tools and techniques for scheduling revaluation tasks and personnel, quality-control techniques, and reappraisal evaluation. Recommended: The Appraisal Foundation’s Uniform Standards of Professional Appraisal Practice (USPAP). IAAO recertification credit: 7.5 hours-1 day

Workshop 452 - Fundamentals of Assessment Ratio Studies

This workshop provides a very basic introduction to the development and uses of assessment-sales ratio studies. The workshop covers the topics of sales analysis, sampling, and the development of assessment ratio studies. The workshop may be expanded an additional half-day to include material on managerial and technical issues, which include staffing, timing of studies use of study results, statistical testing, and assessment regressivity and progressivity.

Recommended: Course 101. IAAO recertification credit: 18.5 hours-2 ½ day

Workshop 550 - Basic of Fixed Assets Valuation

This workshop provides an introduction to personal property valuation and a comprehensive survey of the assessment of fixed assets. It covers the fundamentals of valuation, key appraisal concepts, categories of personal property, discovery and data assembly; and the three approaches to value. Within the three approaches emphasis is on the cost approach, and depreciation as applied to fixed assets, and the reconciliation of approaches. Leased assets are also covered. IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 551 - Valuation of Machinery & Equipment-Advanced Concepts

This workshop provides the opportunity to build on the basics of personal property education. It contains provisions on the appraisal process, depreciation (especially measuring obsolescence) in the cost approach, practical application of the comparable sales approach, development and application of gross income multipliers, and straight-line capitalization of income property. The workshop also includes a “team project” case study. IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 552 - Personal Property Auditing

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.

Recommended: Course 500. IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 553 - Advanced Personal Property Auditing

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. Recommended: Course 500 and Workshop 552. IAAO recertification credit: 18.5 hours-2 ½ days

Workshop 650 - Cadastral Mapping

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

Workshop 651 - Geographic Information Systems for Assessors

This workshop is designed for appraisal practitioners with little or no knowledge of GIS who would like to learn. The emphasis is on the day-to-day operations of GIS. Some attention will also be given to developing a GIS system and database. The first day deals with the basic fixtures and functions of a GIS. The second day covers specific aspects of valuation and assessment administration, including highest and best use analysis, neighborhood analysis, quality control, and valuation defense. The workshop includes software demonstrations and was developed jointly by IAAO and the Urban and Regional Information Systems Association (URISA). IAAO recertification credit: 15 hours-2 days



International Association of Assessing Officers
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CAE AAS CMS RES PPS Professional Designations

Professional Designations

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. Therefore, the IAAO developed and instituted a program of professional designations designed to increase the professional competence of assessment personnel through education.

CAE Certified Assessment Evaluator

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

- Must be an IAAO member in good standing.
- Must have five (5) years of experience in the assessment /assessment field.
- Must have successfully completed IAAO courses 101, 102, 112, 311 or 312, and 400.
- Must successfully complete one of the following USPAP options:
 - If a candidate prior to January 1, 2003: The Appraisal Foundation's National USPAP Workshop or the IAAO's Workshop 151.
 - If a candidate after December 31, 2002: IAAO's Workshop 151 or the Appraisal Foundation's National USPAP Workshop offered through another course provider *and* IAAO's Workshop 171 or the IAAO's online Standards of Professional Practice and Ethics Workshop.

Must satisfactorily complete one residential and one commercial project. **One of the projects must be a narrative appraisal report.**

Residential options are:

- A real property demonstration appraisal report.
- A real property demonstration appraisal report on the computer assisted valuation of a group of residential properties.
- The eight-hour RES case study exam and course 201.

Commercial options are:

- A real property demonstration appraisal report.
- An eight-hour mass appraisal case study exam.
(ONLY IF RESIDENTIAL DEMONSTRATION APPRAISAL REPORT WAS COMPLETED FOR PROJECT OPTION 1)

After all other requirements have been met, the candidate must pass an eight-hour master exam.

AAS Assessment Administration Specialist

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

- Must be an IAAO member in good standing.
- Must have three (3) years of experience in the assessment/appraisal field.
- Must have successfully completed IAAO courses 101, 102, 400, 402, and thirty (30) additional credit hours relating to mass appraisal or public administration.
- For USPAP requirements, please refer back to the CAE USPAP requirement.

Must satisfactorily complete:

- An assessment administration case study examination,
- Or, an assessment administration research project,
- Or, an evaluation of a jurisdiction's assessment practices.

After all other requirements have been met, the candidates must pass a four-hour AAS master examination.

CMS

Cadastral Mapping Specialist

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

- Must be an IAAO member in good standing.
- Must have three (3) years of experience in the field of cadastral mapping.
- Must have successfully completed IAAO courses 101, 600, 601 and ten (10) additional credit hours relating to cadastral mapping and/or geographical information systems.
- For USPAP requirements, please refer back to the CAE USPAP requirements.

Must satisfactorily complete:

- An eight-hour case problem on cadastral mapping.

After all other requirements have been met, must also pass a four-hour CMS master exam.

PPS

Personal Property Specialist

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

- Must be an IAAO member in good standing.
- Must have three (3) years of experience in appraising any class of personal property or in administering a personal property valuation system.
- Must have successfully completed IAAO courses 101, 102, 500, and thirty (30) additional credit hours relating to appraising personal property.
- For USPAP requirements, please refer back to the CAE USPAP requirements.

Must satisfactorily complete:

- Personal property demonstration appraisal report.
- Or, an eight-hour personal property case study exam.

After all other requirements have been met, must also pass a four-hour PPS master examination.

RES

Residential Evaluation Specialist

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

- Must be an IAAO member in good standing.
- Must have three (3) years of experience in the assessment/appraisal field.
- IAAO courses 101, 102, 300 and 311.
- For USPAP requirements, please refer back to the CAE USPAP requirements.

Must satisfactorily complete either:

- Real property demonstration appraisal report.
- Or, an eight-hour residential case study exam and IAAO course 201.
- Or, a real property demonstration appraisal report on computer assisted value of a group of residential properties.

After all other requirements have been met, must also pass a four-hour RES master examination.

IAAO AWARDS PROGRAM

International Association of Assessing Officers **Awards Program**

The IAAO's annual awards program boasts 16 award categories recognizing individual and organizational achievements in several areas including publications, technical expertise and service to IAAO, just to name a few. The Call for Nominations is made in the first quarter of each year, and award recipients are recognized at the IAAO Awards Breakfast held at each IAAO annual conference. The awards program is a highly visible event for IAAO members, and all IAAO members and affiliated organizations are encouraged to submit nominations. The individual award categories are described below, along with stated award criteria. Unless otherwise indicated, all award categories are judged by the IAAO Awards Committee.

All award recipients receive a plaque award, and recognition at the Annual Awards Breakfast at the IAAO annual Conference. However, recipients of the Clifford B. Allen Most Valuable Member Award and the Member of the Year Award receive one complimentary registration for an IAAO educational offering in the year following the acceptance of his or her award.

Clifford B. Allen Most Valuable Member Award

This award is named after the thirty-fifth president of the IAAO, Clifford B. Allen, and is presented to the IAAO member who has, over a period of years, made a significant contribution to the IAAO through participation in its activities and who has made an outstanding contribution to the realization of the mission of the IAAO. Previous winners are not eligible.

Criteria for the nominee include, but are not limited to:

Has served in an elected position of the IAAO, as a committee member, a committee chair, an instructor in IAAO's education programs, a speaker at IAAO's programs, a grader, or an IAAO representative or advisor.

- Has actively promoted the IAAO.
- Has a record of distinguished publications.
- Has been in other assessment and professional organizations.
- Has served in other public service organizations.
- Has been an IAAO member for ten or more consecutive years.

Member of the Year Award

This award is presented to the IAAO member who, in the previous calendar year, has made a significant contribution to the association through active participation in its activities and who, in his or her career, has made an outstanding contribution to the realization of the mission of the IAAO. Previous winners are not eligible.

Criteria for nomination: Individual must have been a member of the IAAO for more than one but less than ten consecutive years.

Distinguished Assessment Jurisdiction Award*

This award is conferred upon a national, state/provincial, regional, or local assessment agency that has instituted a technical, procedural, or administrative program that is, for the affected jurisdiction, an improvement over prior programs and is generally recognized as a component of a model assessment system and contributing factor to equity in property taxation. Jurisdictions of all sizes are encouraged to submit nominations.

Criteria for nomination: This award is given only to government assessment or revenue agencies that have instituted a program as described above in the two years prior to nomination, the results of which have proven to be successful.

Public Information Program Award*

This award is given to assessment jurisdictions that have developed and implemented an effective system for the dissemination to taxpayers of information regarding the assessment process. This program must be fully operational. Jurisdictions of all sizes are encouraged to submit nominations.

Criteria for nomination: Only government assessment or revenue agencies that have implemented such a program in the two years prior to nomination are eligible.

Distinguished Research and Development Award*

This award is conferred upon a nonprofit organization, education agency, private-sector firm, public agency, or individual(s) for original research in property assessment, taxation, or mass appraisal techniques. Jurisdictions of all sizes are encouraged to submit nominations.

Criteria for nomination: Any of the above-described organizations or an individual who has provided unique assistance to the profession is eligible.

Bernard L. Barnard Award*

Named in honor of Dr. Bernard L. Barnard, a former director of research for the IAAO, this award is presented to the author(s) of the best article or essay on technical innovations in assessment or property tax administration. Unpublished essays or articles published in other periodicals or books may also be nominated. All articles published in the Journal of Property Tax Assessment Administration and Fair & Equitable are automatically eligible. For articles that are not published in these IAAO publications, nominees must follow the same submission guidelines, which is submission of 10 copies of Nomination Form C, and 10 copies of the article.

Criteria for nomination: All articles published in Fair & Equitable and the Journal of Property Tax Assessment and Administration are automatically eligible, provided that the author or at least one of multiple authors is a member of the IAAO. As stated above, unpublished essays or articles published in other periodicals or books may also be nominated, and must follow stated submission guidelines.

Donehoo Essay Award*

Named in honor of the first president of the IAAO, John C. Donehoo, this award is presented to the author of the best non-technical essay on assessment, property tax administration, or policy. The submitted essay must be on a topic, written in a style, and of a length suitable for publication in the Journal of Property Tax Assessment and Administration or Fair & Equitable. Refer to these IAAO publications for the published guidelines. The essay may be an unpublished work, or a work published in a non-IAAO publication in the two years prior to submission. For articles that are not published in IAAO publications, nominees must follow the same submission guidelines, which is submission of 10 copies of Nomination Form C, and 10 copies of the article.

Criteria for nomination: All articles published in the Journal of Property Tax Assessment and Administration and Fair & Equitable are automatically eligible, provided that the author or at least one of multiple authors is a member of the IAAO. As stated above, the essay may be an unpublished work or a work published in a non-IAAO publication in the two years prior to submission. If the winning essay was not originally published in an IAAO publication, it will be published in the Journal of Property Tax Assessment and Administration or in Fair & Equitable.

IAAO Journalism Award*

This award was designed to encourage high quality coverage of assessment and property tax concerns by the media. This citation is awarded to individuals or organizations in a news medium that have produced an original work that contributes to a better understanding of assessment administration.

Criteria for nomination: All works must have been published within the calendar year prior to submission.

Zangerle Award*

This award was named in honor of the IAAO's third president, John A. Zangerle, and will be presented to the outstanding periodical publication of an assessors' association, an IAAO chapter, or other similar organization. Awards are presented in two categories: newsletter and magazines. All publications that are submitted must promote the mission of IAAO.

Criteria for nomination: Any periodical devoted wholly to the concerns of assessors is eligible. As stated above, all submitted publications must promote the mission of IAAO.

International Award

This award was designed to encourage improvement of the assessment community's position in an international environment and is presented to any IAAO member whose efforts have helped to advance the global development of assessment professionals. Previous Global or International Award winners and IAAO officers are not eligible.

Outstanding Chapter Award*

This award is conferred upon an IAAO chapter that has made an outstanding contribution to the realization of the mission of the IAAO.

Criteria for nomination: Nominations are open to all chapters of the IAAO which are in compliance with the current chapter regulations. (Chapter Regulations are available from the IAAO Department of Membership upon request.)

Harry Galkin Award

This award was named in honor of Harry Galkin, a longtime associate member, and is presented to the IAAO associate member whose contribution during the past year(s) has been so worthwhile as to demand recognition. Contributions may have been in the area of writing or speaking on equalization, assessment, assessment administration, or general taxation. The individual also may have been distinguished by advancing the mission of the organization through fundraising or through the contribution of time, effort, talent, and resources. The IAAO Associate Member Committee judges the nominations for this award.

Criteria for nomination: Only IAAO associate members are eligible.

Property Tax Achievement Award*

This award is given to a public official or public agency that has made an outstanding contribution to the improvement of property tax administration and to the realization of the mission of the IAAO through an executive, legislative, or judicial action. The action cited in the nomination must represent an affirmation of the goals and objectives of the IAAO and must have taken place no more than two years before the deadline for award nominations.

Criteria for nomination: Any public official (who is not an assessment administrator) or agency (that is not an assessing jurisdiction or revenue agency) is eligible.

McCarren Award

Named in honor of the second president of the IAAO, Kenneth J. McCarren, this award is presented to the IAAO member who has recruited the most number of new members during the given award program year. This award is determined by an IAAO database calculation of who has recruited the most number of new members in that year.

Criteria for nomination: Only current IAAO members are eligible.

Stacey Ford Award

This award recognizes the "IAAO Representative of the Year" who has made outstanding efforts to promote IAAO membership during his or her year of service. The award recipient will be chosen on his or her overall activities and achievements. It is named in honor of Stacey Ford, a former IAAO membership manager, who was the greatest booster and supporter of the IAAO Representative Program. There are no nominees for this category, as it is based on a points accumulated system.

Criteria for nomination: Only currently serving IAAO Representatives are eligible.

Verne W. Pottorff, CAE, Professional Designee of the Year Award

This award was named in honor of the late Verne W. Pottorff, CAE, a former member of the IAAO Executive Board, and is presented to the IAAO professional designee who has most effectively promoted the interests and mission of the IAAO Professional Designation Program. Contributions may have been in the area of enrolling, advising, and encouraging candidates; developing programs to assist candidates; and in other ways promoting the goals of the program. The IAAO Professional Development Committee judges the nominations for this award.

Instructor of the Year Award

This newly created award recognizes instructors who have gone beyond basic textbook instruction and who have motivated students to learn professional skills that will positively influence their careers. It is awarded to an instructor who has made significant contributions toward promoting the educational program and who has demonstrated involvement with the association at the state, regional, national and international levels.

Criteria for nomination: All current IAAO instructors are eligible. The recipient for this award is selected by the Instructor Relations Committee.

If you have any questions regarding the IAAO Awards Program, please contact the IAAO Membership Department at 816/701-8100 or at www.iaao.org.

IAAO Code of Ethics and Standards of Professional Conduct

Adopted by the IAAO Executive Board, September 19, 2005.

Preamble

As a matter of fundamental principle, IAAO members should adhere to the highest ethical standards. Public trust in our performance is the foundation of our credibility. Assessment professionals support IAAO because they trust us to be good stewards of their resources, to uphold rigorous standards of conduct and to serve as a catalyst for excellence in the assessment profession.

Nonprofit organizations must earn this trust every day. It is up to all members of the IAAO – Executive Board members, committee members, volunteers, staff and the general membership – to demonstrate their ongoing commitment to the core values of integrity, honesty, fairness, openness, respect and responsibility.

The purpose of this Code of Ethics and Standards of Professional Conduct is to establish guidelines for assessing officials and all members of the International Association of Assessing Officers (IAAO) and set forth standards by which to judge an IAAO member whose conduct is in question. Members shall conduct themselves in a professional manner that reflects favorably upon themselves, the organization, the appraisal profession, and the property tax system, and avoid any action that could discredit themselves or these entities.

Adherence to the IAAO Constitution, Bylaws, Procedural Rules and Code of Ethics is the minimum standard of expected behavior. We must do more, however, than simply obey the rules. We must embrace the spirit of the governing documents, and go beyond stated requirements, making sure that what we do is matched by what the membership perceives and expects. Transparency, openness and responsiveness to member's concerns must be integral to our behavior.

Statement of Values

The Code of Ethics of the International Association of Assessing Officers is built on a foundation of widely shared values. These values include our:

- Commitment to the improvement of the property tax system worldwide;
- Accountability to the public good;
- Commitment to excellence in assessment administration beyond property tax law;
- Respect for the worth and dignity of all individuals;
- Promotion of inclusiveness, fairness and diversity;
- Obligation to organizational transparency, integrity and honesty;
- Practice of responsible stewardship of resources; and
- Dedication to excellence, and maintaining the public trust.

The values are reflected in the following Code of Ethics of the International Association of Assessing Officers.

Definitions

For definitions of terms relating to appraisal practice, refer to the definitions section of the Uniform Standards of Professional Appraisal Practice (USPAP).

Exceptions

If compliance with or adherence to any Canon or Ethical Rule set forth in the IAAO Code of Ethics and Standards of Professional Conduct would constitute a violation of the law of any jurisdiction, such Canon or Ethical Rule shall be void and of no force or effect in such jurisdiction.

In stating each individual Canon or Ethical Rule, no attempt has been made to enumerate all of the various circumstances and conditions that will excuse an IAAO member from strict observance; however, the IAAO recognizes that illness, acts of God, and various other events beyond the control of an IAAO member may make it inequitable to insist upon a strict observance in a particular case. When an IAAO member, in the exercise of reasonable care, commits a violation due to illness, acts of God, or other circumstances beyond his or her control, it is expected that the Ethics Committee will act in a manner that will avoid an inequitable result.

Inasmuch as there are other remedies under applicable federal, state/provincial, and local laws, nothing in this Code shall apply to the conduct of a member toward his or her employees and other workers in the member's assessment office or appraisal business, including, but not limited to, employment discrimination.

Canon 1: (Professional Duties)

Members shall conduct their professional duties and any activities as a member of IAAO in a manner that reflects credit upon themselves, their profession and the organization.

Ethical Rules

ER 1-1 It is unethical for members to conduct their professional duties in a manner that could reasonably be expected to create the appearance of impropriety.

ER 1-2 It is unethical for members to accept an appraisal or assessment -related assignment which they are not qualified to perform.

ER 1-3 It is unethical for members knowingly to fail in performance of their duties according to applicable laws and regulations or in the uniform application of such laws and regulations.

ER 1-4 It is unethical for members to refuse (by intent or omission) to make available all public records in their custody for public review, unless access to such records is specifically limited or prohibited by law, or the information has been obtained on a confidential basis and the law permits such information to be treated confidentially. Assessing officers must make every reasonable effort to inform the public about their rights and responsibilities under the law and the property tax system.

ER 1-5 It is unethical for members to refuse to cooperate with public officials to improve the efficiency and effectiveness of the property tax in particular and public administration in general.

ER 1-6 It is unethical to engage in misconduct of any kind that leads to a conviction for a crime involving fraud, dishonesty, false statements, or moral turpitude.

ER 1-7 It is unethical to perform any appraisal, assessment, or consulting service that is not in compliance with the IAAO governing documents or the Uniform Standards of Professional Appraisal Practice.

Canon 2: (Truthfulness)

Members shall not make public statements (written or oral) that are untrue or tend to mislead or deceive the public in the course of performing their professional duties.

Ethical Rules

ER 2-1 It is unethical to provide inaccurate, untruthful, or misleading information to solicit assessment-related assignments or to use misleading claims or promises of relief that could lead to loss of confidence in appraisal or assessment professionals by the public.

ER 2-2 It is unethical to claim an IAAO professional designation unless authorized, whether the claim is verbal or written, or to claim disqualifications that are not factual or may be misleading.

ER 2-3 It is unethical to fail to recognize the source (s) of any materials quoted or cited in writings or speeches.

Canon 3: (Conflict of Interest)

Members shall not engage in any activities in which they have, or may reasonably be considered by the public as having, a conflict of interest.

Ethical Rules

ER 3-1 It is unethical for members to accept an appraisal or assessment-related assignment that can reasonably be construed as being in conflict with their responsibility to their jurisdiction, employer, or client, or in which they have an unrevealed personal interest or bias.

ER 3-2 It is unethical to accept an assignment or responsibility in which there is a personal interest without full disclosure of that interest.

ER 3-3 It is unethical to accept an assignment or participate in an activity where a conflict of interest exists and could be perceived as a bias, or impair objectivity.

Canon 4: (Support of IAAO)

Members shall abide by and support the provisions of the IAAO Constitution, Bylaws, and Procedural Rules.

Ethical Rules

ER 4-1 It is unethical for an IAAO member to:

(a) Knowingly to make false statements or submit misleading information when completing a membership application, or to refrain from promptly submitting any significant information in the possession of such member when requested to do so as part of an IAAO membership application.

(b) Knowingly to submit misleading information to the duly authorized Ethics Committee or subcommittee; to refrain from promptly submitting any significant information in the possession of the member as requested by the committee or subcommittee; to refuse to appear for a personal interview or participate in an interview conducted by telephone as

scheduled by the committee or subcommittee; or to refuse to answer promptly all relevant questions concerning an appraisal or assessment-related assignment or related testimony being investigated by the committee or subcommittee. Any member who has submitted misleading information to the Ethics Committee may be subject to ethical charges filed by the committee.

(c) Fail or refuse to submit promptly to an authorized IAAO committee a written appraisal report or file memorandum containing data, reasoning, and conclusions, or to fail or refuse to permit an authorized committee to review an appraisal report , assessment-related assignment, or file memorandum when requested to do so by a person or persons authorized to review such material.

(d) Fail or refuse to submit promptly any significant information in the possession of a member concerning the status of litigation related to an ethics matter when requested to do so by the chair of the Ethics Committee; or knowingly to submit misleading information to the chair of the Ethics Committee concerning the status of litigation.

ER 4-2 It is unethical to fail to comply with the terms of a summons issued by the Ethics Committee.

ER 4-3 It is unethical to refuse to cooperate fully with the IAAO Executive Board, Ethics Committee and the staff of IAAO in all matters related to the enforcement of this Code, as set forth in the Ethics Committee 's Rules and Procedures, as amended from time to time.

ER 4-4 It is unethical to violate the IAAO Constitution, Bylaws, or Procedural Rules.

Canon 5: (Professional Duties)

Members shall comply with the requirements of the Uniform Standards of Professional Appraisal Practice.

Ethical Rules

ER 5-1 It is unethical to fail to observe the requirements of the Uniform Standards of Professional Appraisal Practice.

IAAO Directory

Revised 11/5/2013

IAAO

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Clark, Larry	Director of Professional Development	8130
Daniels, Lisa	Executive Director	8120
Deming, Mary Ann	Accounting Manager	8147
Ford, Carolyn	Research Librarian	8116
Gipson, Mario	Shipping Coord/Advertising Sales Rep	8131
Hernandez, Matt	Database Coordinator	8111
Lathrop, Ashley	Billings Supervisor	8125
Moore, Aubrey	Director of Meetings	8115
Odom, Mary	Director of Library Services	8117
Parrish, Robin	Director of Membership	8101
Reed, David Wayne	Chapter/Affiliate/Representative Manager	8105
Ritter, Leann	Special Projects Manager	8161
Scheffler, Melissa	Marketing Coordinator	8135
Smith, Kate	Membership/Publications Mktg. Coordinator	8122
Spiegel, Jean	Education Manager	8133
Turner, Vickie	Executive Assistant/Receptionist	8100
Weatherford, Aaron	Technology and Data Manager	8141
Williams, Lisa	Membership Administrative Assistant	8112
Witthar, Wanda	Designation Program Manager	8137
York, Matt	Exam & Records Processor	8136
BOARD ROOM (3 RD FLOOR)		8121
STAFF KITCHEN		8150
FAX – FIRST FLOOR (Accounting/ Admin/Marketing/Membership)		8149
FAX – GROUND FLOOR (Shipping/Library)		8159
FAX – SECOND FLOOR (Professional Development/Meetings)		8169