

# EXCELLENCE RECOGNIZED IS EXCELLENCE REALIZED

Calvin A. Kent, Ph.D., AAS



CERTIFICATE OF EXCELLENCE IN  
ASSESSMENT ADMINISTRATION

*The statements made or opinions expressed by authors in Fair & Equitable do not necessarily represent a policy position of the International Association of Assessing Officers.*

**Y**ou think your office is doing an excellent job of assessing and you want the world to know it. Or you wonder whether there are some areas that could be improved and you want to measure your office’s efforts against the most exacting assessing practices.

Does your office fit either of these categories? If so, then your jurisdiction should join the other 24 jurisdictions that are the “elite of the assessment business” by achieving the coveted IAAO Certificate of Excellence in Assessment Administration (CEAA). Table 1 is a list of the assessment jurisdictions that have achieved the CEAA designation and the jurisdictions that have been recertified.

There are more than 13,000 assessment jurisdictions in the United States and hundreds more internationally. Thus joining the highly select group of CEAA recipients is an unsurpassed distinction with significant benefits to any jurisdiction.

Recognition from IAAO through the CEAA is the highest professional honor for an assessment jurisdiction. Achieving the CEAA is not easy; if it were, it would have no value. The purpose of this article is to convince assessment jurisdictions that there are many reasons why the effort to obtain the CEAA is a very rewarding activity.

## Was Being Earning the CEAA Worth the Effort?

At the time the CEAA is granted, IAAO sends a questionnaire to the jurisdiction seeking feedback about the experience. In addition, last fall the Committee on Excellence in Assessment Administration sent a questionnaire to all CEAA recipients

**Table 1.** Assessment jurisdictions that have achieved the CEAA designation

Certified Jurisdictions
Ada County, Idaho (2012)
Carteret County, North Carolina (2013)
City of Alexandria, Virginia (2012)
City of Hampton, Virginia (2011)
City of Regina, Saskatchewan Canada (2013)
Clay County, Florida (2011)
Dallas Central Appraisal District, Texas (2013)
Davidson County, Tennessee (2012)
El Paso Central Appraisal District, Texas (2012)
King County, Washington (2008)
Lee County, Florida (2008)
Leon County, Florida (2012)
Manatee County, Florida (2008)
Orange County, Florida (2012)
Osceola County, Florida (2010)
Pinellas County, Florida (2011)
Sarasota County, Florida (2012)
Taylor Central Appraisal District, Texas (2012)
Washington County, Arkansas (2012)
Wichita Central Appraisal District, Texas (2013)
Williamson Central Appraisal District, Texas (2013)
Recertified Jurisdictions
Alachua County, Florida (2004, 2010)
Johnson County, Kansas (2005, 2011)
Seminole County, Florida (2005, 2012)

seeking specific data and responses to certain questions. Twenty-one of the 24 jurisdictions responded and results can be viewed on page 8.

Concerning the value of the CEAA, all the respondents to the committee survey either agreed or strongly agreed with the statement, “Working and obtaining the CEAA was an entirely worthwhile endeavor for our organization.” Comments included the following:

- “Totally without a doubt”
- “Most definitely”
- “A great project that promoted the sharing of information within our organization”
- “Very positive in creating increased pride within our office”
- “The most rewarding accomplishment this office has seen in my 15 years.”

The Dallas, Texas, Central Appraisal District stated,

*...our agency recognizes IAAO is the lighthouse for our industry with regard to establishing best practices to insure fairness, equity and professionalism To have IAAO, who is the preeminent authority on administration, independently and objectively determine that the DCAD is meeting appraisal standards and best practices is paramount.*

The El Paso, Texas, Central Appraisal District noted,

*We always felt we were doing well. But to have an organization with such high standards as IAAO review our practices and say we have achieved a level of excellence—priceless.*

The Washington County, Arkansas, Assessor’s office saw the CEAA as affirmation for “...utilizing the best practices in the industry.” The Sarasota County, Florida, Property Appraiser’s office commented,

*As recipients of the CEAA, we take pride in knowing our office’s methods and standards are in accordance with the best practices in the industry as defined by IAAO.”*

The Ada County, Idaho, Assessor’s office replied,

*CEAA provides the independent validation that the office is meeting or exceeding industry standards and continually enhancing service.*

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***In the words of those who have earned it, the following are the specific benefits of the CEAA:***

- ***Recognition of the jurisdiction’s excellence by peers and the public***
- ***Increased public trust in the appraisal process***
- ***Improved office pride and morale***
- ***Better communication and teamwork within the office***
- ***Improved assessment practices***
- ***Professional growth of staff***
- ***Encouragement in recruitment of staff.***

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- Professional growth of staff
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**Increased Recognition of Excellence**

All high-quality organizations want to be recognized and applauded. Several queries on the survey were aimed at determining whether the CEAA accomplished this. Almost all the survey respondents agreed or strongly agreed that the CEAA had increased their visibility “among the public (newspaper stories, customer comments, TV/radio comments/interviews.” Displaying the CEAA logo on Web sites, business cards, and correspondence

*...allows us to showcase this accomplishment with every person we contact, and our customers are impressed with the recognition and tend to look at our organization in a new light.*

More than 80 percent of the respondents noted that they had received increased recognition “by our governing body (county commission city council etc.)” Said one district, “This certificate adds a tremendous amount of credibility from the jurisdictions that we serve.”

One jurisdiction received both a special recognition from the city council and an award for excellence. Another replied,

*We have had several taxing unit governing bodies comment during their meetings about the certificate and the great work that is being done at our office.*

The King County, Washington, Department of Assessments replied, “We have witnessed that Board Members love that ... (the) Department of Assessments is so highly respected...”

Several CEAA jurisdictions noted that they had received admiration from other units of local government for their achievement. One proudly proclaimed,

*All other departments of county government have been amazed, but*

*not surprised, that we have attained the recognition certificate from the International Association of Assessing Officers.*

A county commission enjoyed “the bragging rights” of the appraisal jurisdiction’s CEAA.

Other respondents experienced increased credibility with their review board. This result was characterized by one jurisdiction as follows,

*If members of the appraisal review board know that the appraisal district is performing at this high level then the credibility of the district is substantially higher.*

Another was pleased that “this certificate will further our reputation before the various tribunals.” Further affirmation was given by another district,

*The receipt of the CEAA was extremely well received by the taxing jurisdictions within our county as well as by our Board of Directors among whom many are elected officials.*

Another jurisdiction was happy to relay,

*The members of the Board of Directors were proud of our district’s accomplishment and were more than happy to show it through increased compensation.*

The Canadian recipient, the City of Regina, Saskatchewan, Assessment and Property Tax and Administration Branches, summed up the positive reception the certificate has granted them:

*The recognition that we received in obtaining the CEAA has made our interaction with the Quorum Court easier than it has ever been. If we come to them with a request it is generally approved with little discussion because they know we are a professionally run operation that meets the highest standards in the assessment business and that nothing we may desire to do would jeopardize that standing.*

Jurisdictions that have marketed their designation by public announcements, news stories, and display of the CEAA logo on business cards, brochures, websites, Facebook, and correspondence have received the greatest public response. Seminole County posted their CEAA achievement on the county’s Facebook page and received more positive comments from constituents than for any other post.

### **Increased Public Trust**

Trust in government among the general population is at a very low point. Property taxes are not viewed favorably by the public, and this attitude rubs off on those who administer them. However, recipients of the CEAA have found it to be a means of improving public trust and confidence in how their jurisdiction carries out its legal mandates. The Assessor of Property in Davidson County, Tennessee, stated,

*Having the preeminent authority on assessment administration, independently and objectively determine that we are meeting standards and best practices in the appraisal profession will enhance public trust. Having the CEAA branding in our office has been a great addition... it has assured the general public they’re dealing professionals...*

The Orange County, Florida, Property Appraiser’s office commented that the CEAA had,

*...offered the public official confirmation of our methods. Additionally, it offers the citizens confidence and assurance in the work product and staff.*

The El Paso, Texas, Central Appraisal District saw the CEAA as a demonstration of their “...continued commitment in gaining public trust.” The Dallas, Texas, Central Appraisal District found the transparency of the CEAA process increased public confidence as well as assured the public the office was “...

conforming to best practices to ensure fairness, equity and professionalism.”

### **Improved Pride and Morale**

The greatest asset any organization can possess is pride among its members. According to the survey, there is more than 90% agreement that the CEAA process “instilled greater pride and morale among the employees.”

As one CEAA recipient answered,

*We are still popping our buttons with pride. We will enjoy the bragging rights for years to come.*

Another respondent stated,

*Every member of our appraisal district has felt a sense of pride once the certificate was announced, which in turn has increased the overall morale of our district. Everyone wants to be a part of a successful organization and this certificate proves that through education and teamwork great things can happen.*

Another responded that receiving the CEAA “...instills greater pride and morale among employees.” The El Paso, Texas, Central Appraisal District said,

*Another benefit is the power and recognition of our employees. This in turn is giving them the drive and excitement to continue to excel and lead into the future.*

Another jurisdiction replied,

*...upon completing and receiving the CEAA certificate, the entire office bonded in a way that would be difficult to accomplish through daily work.*

### **Better Communication and Teamwork**

Many of those responding to both the survey and the questionnaire believed that it was teamwork and departmental communication that led to their success in obtaining the CEAA. One survey respondent stated,

*We have always worked as a team. It took existing teamwork to successfully complete the application.*

A significant majority of respondents affirmed the statement that the CEAA “created an enhanced environment for cooperation and teamwork.”

Another responded,

*The writing of the document was a team effort and it brought the staff together and allowed us to tell our story.*

The Sarasota County, Florida, Property Appraiser’s office found

*...a deeper appreciation and understanding of the expertise and knowledge held and shared by the members of the SCPA team.*

The Washington County, Arkansas, Assessor’s office stated:

*The value in the certificate of excellence is not primarily in the plaque that you receive or in the recognition that is afforded successful jurisdictions. The true value is in the way it draws your team together and in the way your team members are able to see that we aren’t individual sections within the Assessor’s Office; that in fact what each and every one of us does effects all aspects of the office; and that to be successful we have to work together toward the common goal of the being the best that we can within our field.*

### Improved Appraisal and Assessment Practices

One purpose of the CEAA is to allow jurisdictions to take a fearless inventory of their operations to determine whether they align with the best practices in the appraisal business. More than eighty percent of those responding anonymously found the process “helped us identify operation processes that could be improved.”

Supporting comments came from other CEAA recipients:

*“We found areas that we could improve. Most involved application of newer technology.”*

*“Weaknesses that we were not aware of came to light as we proceeded through the process and now it is our goal to move our weaknesses to our strengths.”*

*“The staff is now keenly aware that their input on how to improve operation is both desired and key to improving our office.”*

*“The CEAA application process provided an excellent opportunity to analyze every function of our office.”*



*The CEAA plaque recognizes the completion of the certificate program*

The value of the CEAA process was summarized by one jurisdiction as follows:

*Going through the self-assessment manual helped us determine those areas where we are strongest, and find new and better ways to accomplish tasks, identify areas in which we could improve and discard practices that were out-of-date.*

### Professional Growth of Staff

Questionnaire and survey responses indicated additional benefits for staff that the CEAA had conferred on recipients. A couple of respondents replied that the certificate had “increased staff response to training and educational opportunities.”

Anticipating recertification, one jurisdiction reported,

*We have set the bar high with this certificate. Our folks have taken pride in this achievement and want to continue to meet this standard. Continued improvement and profession growth will be necessary to maintain it.*

This response was seconded by another recipient jurisdiction:

*Our employees have seen our district grow once we began to embrace IAAO standards, and they want to continue in their own personal growth by working for IAAO certifications.*

In answering the query about whether the CEAA had enhanced ability to recruit new staff, one jurisdiction commented, “Prospective employees are drawn to department based on the professionalism and high quality of work...” Another said, “We are going through a recruitment process and have used the CEAA to entice staff to join our branch,” while another stated, “I do think for recruiting in the assessment field this designation is very helpful.”

### Starting the Process

The requirements for becoming a candidate are shown in table 2.

Once a jurisdiction becomes a candidate, the following are the next steps.

### Be in Contact with the Mentor

CEAA Committee members volunteer as mentors for each candidate. In all probability, the mentor will contact the jurisdiction as soon as one is designated, preferably before the work begins. The role and responsibilities of the mentor are provided in the *Mentor Guide* and include ensuring the applicant prepares a professional submission and the submission can be graded efficiently and objectively.

Recognizing that preparing the submission is a difficult and time-consuming

task, the mentor facilitates the process by answering questions, obtaining information from IAAO, and providing feedback. The mentor will request that a jurisdiction submit several chapters to the mentor in advance for review. They will then be returned with suggestions for improving the submission prior to sending it forward for grading. The mentor is *not the grader* but the communication link between the jurisdiction and the grader on any issues that may arise during the grading process.

### Assemble the Team

Arrange for your team to meet with your mentor and set up a timeline. Have your technical staff create the responses and submit to your strongest writer for editing. Your lead writer will compile all chapters into a cohesive document for review by your entire team for accuracy.

### Review the *Assessment Practices Self Evaluation Guide*

When the CEEA application is received, IAAO sends the jurisdiction a copy of the *Assessment Practices Self Evaluation Guide*, 4th edition. Follow the *Guide* in preparing the application. Although the guide can be used for other purposes, it incorporates the best practices of assessment administration,

which are used to evaluate the candidate jurisdiction. In its application the jurisdiction provides the materials requested, answers all questions, and attaches supporting documentation. The *Guide* is a tool filled with evaluations, suggestions, concepts, and ideas that can be used to improve office practices. “

This guide incorporates accepted standards of assessment practice in the publications and standards of IAAO. It also reflects the requirements of the Uniform Standards of Professional Appraisal Practice (USPAP).

The importance of using the appropriate IAAO technical standards is stressed in the *Guide* and the grading. The following topics are covered in the *Guide* and will be included in the submission:

How long will it take? For jurisdictions that have been successful, the process has taken only 6 months and as long as two years; the average is less than a year.

### Grading

After completing the requirements in the *Guide*, the candidate jurisdiction submits its report in electronic format to IAAO for grading. Grading is accomplished by one or more of those key individuals whose jurisdictions are

already CEAs. No graders can be from the applicant's home state. Graders are selected by the CEEA Committee.

Each chapter of the submission is graded separately, and a passing score of 80 percent on each chapter is required. If any chapter does not meet the 80 percent criterion, the mentor is notified and the candidate is given the opportunity to revise and resubmit. Considering the volume of material required for the submission, the grader must be given adequate time to complete the work. Nevertheless, the goal is to submit the application to the grader such that, if the submission is satisfactory, the certificate can be presented at the next annual conference.

### Recertification

All jurisdictions holding the CEEA must recertify after completion of their fifth year. To be recertified, the jurisdiction must rewrite four of the chapters in the original submission and indicate any changes in their legislative, management, and organizational environment. There are also educational requirements for the appraisal professionals working in the office.

To date, all three of the original CEEA recipients have received recertification.

### Developments in Texas

One of the most exciting developments for the CEEA has occurred in Texas. The State Comptroller's Property Tax Assistance Office requires that a Methods and Assistance Program (MAP) be completed by each of the state's 252 appraisal jurisdictions on a biannual basis. Now, the CEEA is accepted in lieu of two of the four MAP sections in Texas appraisal districts that have attained the CEEA distinction. For the five Texas offices that have obtained the CEEA, this is indeed good news and an additional recognition of the performance quality that the CEEA confirms. IAAO hopes

**Table 2.** Certificate Requirements

1. The applicant jurisdiction must have at least one employee who is a current IAAO member in good standing.
2. The submitter, assessment jurisdiction (candidate), and the submission must comply with the IAAO Code of Ethics and Standards of Professional Conduct.
3. The candidate jurisdiction must be an appraisal and assessment agency and not solely an oversight agency.
4. The application must be submitted with the accompanying fee as detailed in the latest International Association of Assessing Officers Certificate of Excellence in Assessment Administration Program, General Procedures.
5. Jurisdictions must identify the year of compliance that can be no older than one year from the date of submission of application. This one-year window of opportunity (end of year of compliance) is based on the final valuation notice mailing date.
6. Each candidate jurisdiction shall receive an electronic copy of the latest:
  - *Assessment Practices: Self-Evaluation Guide*
  - IAAO CEEA Instruction Manual
  - IAAO CEEA General Procedures
  - IAAO CEEA Electronic Submission Template

\* This project requires the candidate jurisdiction to complete a detailed report on their assessment practices following the format of the *IAAO Assessment Practices: Self-Evaluation Guide*.

this precedent will be contagious and spread to other states.

**Conclusion**

IAAO considers the expansion of CEEA recipients to be one of its highest priorities. IAAO has established a special committee to oversee the CEEA program.

As an indication of the importance of the CEEA, the IAAO Executive Committee has approved presenting the certificate at the annual banquet rather than at the awards luncheon at the annual conference. This decision acknowledges that the certificate is an earned recognition instead of a nominated award.

Information sessions at the annual conference for those interested in starting the process will be continued. Special emphasis will be given to ensuring that the CEEA jurisdiction is honored at

state and regional meetings, and information and encouragement will be provided to those interested in the CEEA.

Is your office ready to be recognized as one of the best is the assessment business? The CEEA Committee has one message for you, Go for it!

To find out more about the program, visit [www.iaao.org](http://www.iaao.org), go to the Membership drop-down menu and select CEEA Program. The Self-Evaluation Guide Table of Contents and template questions are available upon request from [excellence@iaao.org](mailto:excellence@iaao.org).

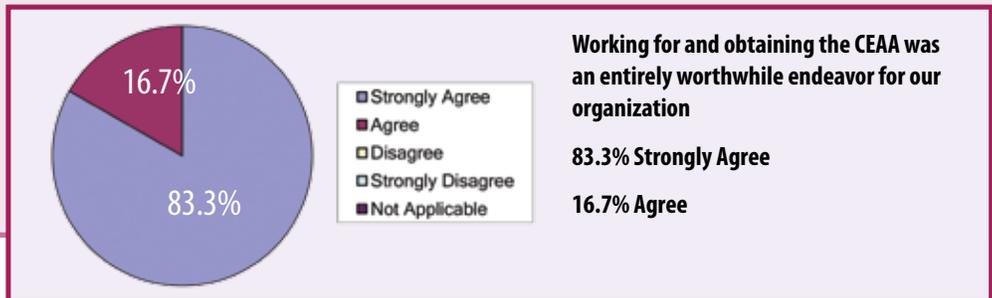
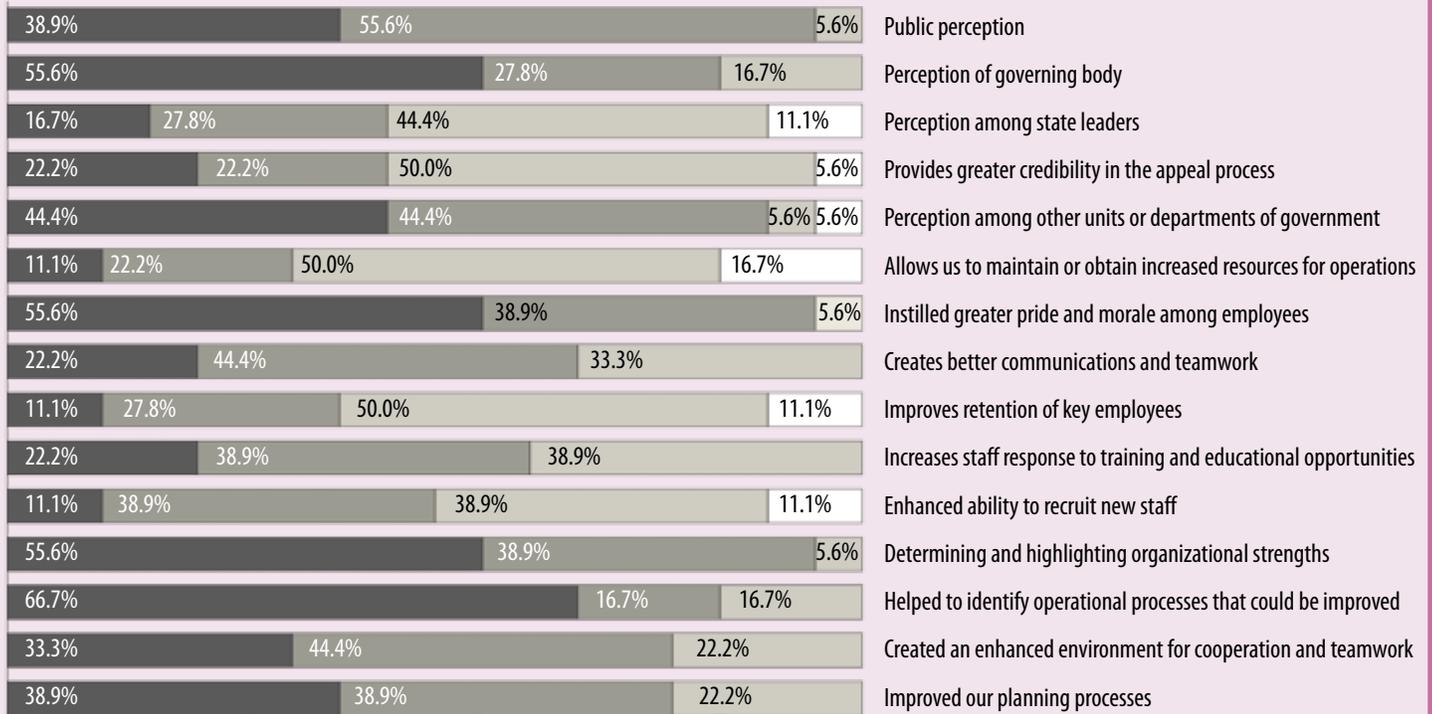


Calvin A. Kent, Ph.D., AAS, holds the Lewis Distinguished Chair in Business at the College of Business, Marshall University, Huntington, West Virginia.

He is also Director of the BB&T Center for American Capitalism (endowed by the Branch Banking and Trust Company), and a Distinguished Fellow in Economics at the Center for Business and Economic Research at Marshall University.

Dr. Kent is a member of the West Virginia Property Valuation Commission. He currently serves on the IAAO Certificate of Excellence in Assessment Administration Special Committee.

**CEEA Survey-at-a-Glance—Rate how CEEA certification affects the following areas:**



## Things to Know When Preparing for the CEEA Certificate Program

- Jurisdictions seeking the CEEA are first asked to provide the legal framework under which their office labors. In considering their management, applicants need to demonstrate they have the necessary resources to discharge their legal obligations.
- Candidate jurisdictions are required to document their use of technology to determine whether their systems are up-to-date and whether both the computerized and manual mapping systems allow accurate identification of real property and its influencers. The newest edition of the *Guide* has been significantly revised to stress the importance of employing technology in all aspects of assessment. The CEEA application emphasizes how data collection practices are used.
- Three chapters of the *Guide* deal with the documentation and discussion of land, residential, and commercial valuation methods used by CEEA candidates. If assessment of personal property is included in a jurisdiction's mandates, the procedures used for that evaluation must also be scrutinized.
- The importance of using the appropriate statistical methods is stressed in the *Guide*. The applicant jurisdiction must detail how it reviews its data collection and processes and how it evaluates the accuracy of its assessments including the sales ratio study and other statistical tests.

## IAAO AWARDS PROGRAM 2014 CALL FOR NOMINATIONS COMING SOON



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

### Annual Awards Program

IAAO's annual awards program boasts twenty award categories recognizing individual and organizational achievements in several areas including publications, technical expertise and service to IAAO, just to name a few. Nominations are accepted at the beginning of each year through May 1. Award recipients are recognized at the IAAO Annual Conference. The annual awards program is a highly visible event for IAAO members, and all IAAO members and affiliated organizations are encouraged to submit nominations.



### AWARD CATEGORIES

#### INDIVIDUAL AWARDS

- Clifford B. Allen Most Valuable Member Award
- Member of the Year Award
- Bernard L. Barnard Outstanding Technical Essay Award
- John C. Donehoo Essay Award
- International Award
- Verne W. Pottorff, CAE, Professional Designee of the Year Award
- Instructor of the Year Award
- Professional Development Lifetime Achievement Award
- Emerging Professional Award

#### NONINDIVIDUAL AWARDS

- Distinguished Assessment Jurisdiction Award
- Public Information Program Award
- John A. Zangerle Award
- Outstanding Chapter/Affiliate Award

#### INDIVIDUAL OR NONINDIVIDUAL AWARDS

- Distinguished Research and Development Award
- IAAO Journalism Award
- Property Tax Achievement Award

Look for full information about submitting award nominations in the February issue of *Fair & Equitable*. Go to [www.iaao.org](http://www.iaao.org) under Membership for more information.