

2018

# General Procedures

Certificate of Excellence in Assessment Administration



**CERTIFICATE OF EXCELLENCE IN  
ASSESSMENT ADMINISTRATION**

ASSESSMENT ADMINISTRATION  
CERTIFICATE OF EXCELLENCE IN

International Association of Assessing Officers  
PROFESSIONAL DEVELOPMENT COMMITTEE

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## *General Purpose*

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This program was designed by the International Association of Assessing Officers (IAAO) to recognize governmental units utilizing best appraisal and assessment practices in their offices. The IAAO Certificate of Excellence in Assessment Administration (CEAA) recognizes a strong emphasis on teamwork, accomplishments, and an avenue of satisfaction among peers and constituents for excellent practices. In addition, the IAAO believes that the process of completing the required information for the Certificate will serve as a learning process for the applicant and may be used to further improve the jurisdiction's appraisal and assessment operations.

The foundation for this program shall be the latest revision of the *Assessment Practices: Self-Evaluation Guide* published by IAAO.

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## *Application Process*

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- A. For those jurisdictions desiring to participate in the Certificate of Excellence in Assessment Administration Program, an application must be submitted with the accompanying fees as detailed in the following section.
- B. Jurisdictions applying for the Certificate must identify the year of compliance, and this date may be no more than one year from the mailing of final notices for that year.
- C. IAAO shall assign a Mentor and an independent grader or panel of graders to determine if the jurisdiction's submission meets the criteria outlined in the *Assessment Practices: Self-Evaluation Guide*. Final determination for granting of the Certificate will rest with the Professional Development Committee. Grading of the submission shall take no longer than ninety (90) days from the jurisdiction's submission date. **To be recognized at the Annual International Conference on Assessment Administration in a given the deadline for submission is April 1 of the same year.**
- D. The candidate jurisdiction must be an appraisal and assessment agency and not solely an oversight agency.
- E. A jurisdiction seeking the CEAA may use outside assistance from those who are not permanent members of the jurisdiction's staff. This outside assistance may only *draft, edit, prepare exhibits, and create links to exhibits* (including websites, legislation, procedural rules, other documents and audio visuals) which are to be the supporting materials of the submission. The scope and duties of the outside assistance will be limited to the ***administration and the preparation*** of the CEAA report as outlined above.

Those providing outside assistance must be under the direct supervision and control of the primary officer with responsibility for the preparation of the CEAA report. Those providing outside assistance are to work in close contact with an individual(s) or committee(s) appointed or established by the jurisdiction pursuing the CEAA. All work performed under the agreement must be original for the jurisdiction and no “canned” or plagiarized material is included.

Those providing the outside assistance described above are not the final preparers of the report. That responsibility may not be delegated by the jurisdiction to those who provide outside assistance.

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*IAAO CEAA Program Fee Structure*

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	<b>Jurisdiction Size (Including both Real and Personal Property)</b>		
	Less than 25,000 Properties	25,001 to 99,999 Properties	More than 100,000 Properties
<b>Application Fee</b>	\$200	\$200	\$200
<b>Completion Fee</b>	\$500	\$1,000	\$2,000
<b>Chapter Revision Fee</b>	\$100	\$100	\$100
<b>Annual Renewal Fee</b>	\$200	\$200	\$200
<b>5-Year Recertification Fee</b>	\$500	\$500	\$1,000

*Note:* The above fee structure was approved by the IAAO Executive Board in July 2018. The fee structure is subject to review each year by the Budget Committee to set the appropriate fee schedule.

- A. A Mentor will be assigned to each jurisdiction applying for the CEAA by the Professional Development Committee Chair upon application. The Mentor will have completed the CEAA process and maintain the certification in an approved status or attended the CEAA mentor training or has been an active past member of the CEAA subcommittee.
- B. A Mentor will provide guidance to the Candidate with the support needed to effectively and successfully complete the submission and receive the Certificate. The Mentor's goal and objective is:
1. To ensure that the Candidate prepares a professional submission as described in the Instruction Manual under "General Guidelines".
  2. To ensure that the submission will be graded efficiently and objectively.
- C. An initial meeting should be held prior to beginning work so that the submission gets off to a good start. The meeting may be in person or by conference call. Other individuals may be included in the meeting at the Candidate's request.
- D. The Mentor does not work for the Candidate and does not do the work for the Candidate. The Mentor will *be the liaison between the Candidate, Professional Development Committee, and the Grader* to facilitate answering questions, providing information to or from the various outside participants including IAAO staff through the process and provide constructive feedback to both the Candidate and outside participants.

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### *Grading Criteria and Certification*

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- A. IAAO will provide the Candidate an electronic copy of:
- *Assessment Practices Self-Evaluation Guide*
  - *Certificate of Excellence in Assessment Administration Instruction Manual*
  - *Certificate of Excellence in Assessment Administration Electronic Template*
  - *Certificate of Excellence in Assessment Administration General Procedures*
- B. The candidate jurisdiction shall answer each question presented in the *Assessment Practices Self-Evaluation Guide*. Upon completion of the requirements identified in each chapter of the *Assessment Practices: Self Evaluation Guide* (see the shaded text at the end of each question in the guide), the Candidate shall

submit the completed responses using the Electronic Template and completion fee as listed in CEAA Program Fee Structure to the IAAO.

1. A grader or panel of graders shall be assigned by IAAO to evaluate the answers for accuracy, completeness of information, and supplemental documentation to include in exhibits.
2. All questions are graded on a sliding scale and partial credit may be given. The review and evaluation must find the Candidate's response to each question compliant or better to receive the points allocated to each question.
3. To receive the IAAO Certificate of Excellence in Assessment Administration (CEAA), a score of 80 percent or higher must be received for each relevant chapter. All chapters are considered relevant except those which have no application to the work and activities of the office. These could include activities which the office does not perform because of pertinent state law or regulation or are conducted by another agency. (For example in some jurisdictions, Personal Property in whole or part is not taxable so those questions related to Personal Property should not be included in the report or application.) Jurisdictional Exception questions which are to be omitted must be identified in the letter of transmittal as irrelevant and not applicable within the jurisdiction.

If a Candidate does not receive a score of 80 percent or higher on any chapter(s), they will be notified by their Mentor of those chapters and questions where they are not fully compliant and the Candidate will be given the opportunity to revise or provide additional documentation.

4. When the revision requires a third attempt and is still is not fully compliant, the Candidate will be allowed to make an additional revision at a \$50 per chapter revision fee.

C. If a jurisdiction fails the resubmission process, the jurisdiction will be required to submit a new application with a new year of compliance, and applicable fees.

D. Successful jurisdictions shall be:

1. Awarded a plaque by IAAO honoring the jurisdiction with the IAAO Certificate of Excellence in Assessment Administration;
2. The IAAO shall prepare for distribution:
  - a.) A short news release for local publication,
  - b.) An article for *Fair & Equitable*,
  - c.) A notice to any local associations or IAAO chapters.

3. The IAAO will provide formal recognition at the Annual Conference including:
  - a.) A Name Badge Ribbon for each of the jurisdiction's attendees,
  - b.) Formal recognition for all jurisdictions that achieve certification during the prior year similar to that given to new designees.

**E. Thereafter, the jurisdiction will have to submit their annual renewal dues for the subsequent five (5) years.**

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### *Recertification*

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The recertification process is different than the initial submission as the jurisdiction is only responsible for updating four chapters while still maintaining the same criteria.

All Certificate holders must reapply for recertification after the completion of their fifth year. Certificate holders will then have one (1) year to submit the necessary documents. The recertification documentation will include a Letter of Transmittal, Summary of Material Changes since the original certification, Four (4) rewritten and updated chapters, and a Spreadsheet of Continued Education hours. **To facilitate documentation of meeting the educational requirements IAAO highly recommends tracking all educational hours throughout the 5-year period.**

Recertification is to be based on meeting four categories of requirements:

1. Recertification Candidate shall provide IAAO with a spreadsheet showing that education averaged at least 14 hours per appraisal professional per year over the five (5) year period. Appraisal professionals are those directly involved in placing values on property, including but not limited to, elected or appointed officials, executives, deputies, managers and supervisors of those directly involved in placing values on property. Additionally, the only educational courses that can be applied toward the educational requirements are:
  - a.) IAAO courses including workshops, IAAO conference educational sessions, one day forums and webinars.
  - b.) State or province approved appraisal courses or seminars.
  - c.) Appraisal designation courses.
  - d.) Any education that meets the IAAO Procedural Rule 10.11.3 on Qualifying Educational Programs.
  - e.) Formal internal in-house programs, workshops or courses conducted by assessing & appraisal jurisdictions and organizations.

2. Certified jurisdictions are required to provide a mentor or grader for one future program candidate during the five-year recertification cycle. Unless otherwise stated the contact listed on the jurisdiction's program application will be used.
3. The Candidate will rewrite four chapters apart from Chapter 1. Chapter 1 in the recertification submission is replaced with the Summary of Material Changes after the original CEAA Submission. Four new chapters must be selected each renewal cycle until all twelve (12) chapters are rewritten. A new five (5) year cycle begins every six (6) years.
4. In addition to the educational requirements and the four chapters, the recertification Candidate will prepare a Summary of Material Changes since their last certification including:
  - any significant new tax policy (local or state/province) changes during the last five years and what its effect was on the office;
  - any significant changes in office technology during the last five years and what its effect was on the office;
  - any significant changes in office management during the last five years and what its effect was on the office;
  - any significant changes in the organization and staffing of the office during the last five years and what its effect was on the office.

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*Liability Disclaimer*

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The *Assessment Practices: Self-Evaluation Guide* is designed to be a self-conducted evaluation of specific accepted assessment administration and appraisal practices. It is designed to facilitate improvement and provide recognition of better assessment administration and appraisal practices. In reviewing the information and materials provided, including the responses to *Assessment Practices: Self-Evaluation Guide* submitted for this Certificate, the IAAO has made no independent verification of the accuracy and/or completeness of the information submitted. All information received is considered reliable, true, and correct. The IAAO does not warrant or assure liability or responsibility for the accuracy, veracity, completeness, or usefulness of any of the supplied or published information. In addition, IAAO makes no warranties, expressed or implied, with regard to any of the reported practices.