



**IAAO**

INTERNATIONAL ASSOCIATION  
of **ASSESSING OFFICERS**

*Valuing the World*

# Professional Development Manual

*(Revised August 2024)*

# CONTENTS

- Section 1. Introduction**.....3
  - Chair Responsibilities.....3
  - Member Responsibilities.....3
  - Committee Scope: Credentialing Program .....4
- Section 2. Committee Responsibilities**.....5
- Section 3. Committee Tasks and Procedures**.....5
  - Designation Program Purpose.....5
  - Support Programs/Resources.....6
  - Designation Examinations .....6
  - Comprehensive/Master Examinations.....7
  - Case Study Examinations .....7
  - Education Requirements.....8
  - Experience Requirements.....10
  - Demonstration Requirements.....10
  - Graders.....11
  - Awarding the Designation .....11
  - Evidence of the Designation.....11
  - Maintaining the Designation .....12
  - Qualifying Continuing Education.....12
  - Claiming Credit .....12
  - Retired Status.....13
  - Designation Termination.....14
  - Designation Reinstatement .....14
- Section 4. Professional Member Program** .....15
- Section 5. CEAA Program**.....16
  - CEAA Mentors.....16
  - CEAA Grading.....17
  - CEAA Recertification.....17
- Section 6. Committee Documents**.....18
- About IAAO** .....19

# SECTION 1

## Introduction

*IMPORTANT – IAAO manuals are intended to provide information. The content of this manual is based upon content in the IAAO bylaws and procedural rules. If there are discrepancies between this manual and the IAAO bylaws and procedural rules, those IAAO governing documents shall prevail. It is the responsibility of the committee or task force to recommend updates to this manual as necessary to ensure its accuracy.*

The president and president-elect determine the number of members of each committee and task force, with one member designated as chair for a one-year term. To be eligible for appointment as a committee chair, a member must have met the eligibility criteria listed in the IAAO procedural rules. There may also be a staff liaison, task forces, and subject matter experts assigned to support the work of the committee as needed.

The chair coordinates the work of each committee. The chair is responsible for directing the members and activities of the committee to ensure that goals and objectives are met.

---

## CHAIR RESPONSIBILITIES

**The responsibilities of the chair are to:**

- Determine methods by which the committee charges are met;
- Prepare agendas for meetings and distribute required resources;
- Set expectations for members' contributions and responsibilities;
- Delegate and monitor work assignments;
- Ensure committee work is completed in an efficient and cost-effective manner;
- Recommend committee appointments;
- Ensure that meeting notes are taken and that the minutes are produced;
- Distribute minutes of meetings; and
- Report to the board of directors as requested.

---

## MEMBER RESPONSIBILITIES

**Committee members work toward the fulfillment of IAAO's objectives by:**

- Reviewing all relevant material/background information;
- Completing assignments assigned by the chair;
- Meeting all deadlines;
- Supervising the work of assigned task forces and assisting as necessary; and
- Participating in all meetings and activities of the committee.

All committee members must complete IAAO Workshop 171 prior to service on the committee. Committees hold in-person meetings as approved by the president. All expenses for these meetings are paid per IAAO's expense guidelines. In addition, committees use electronic communication for ongoing collaboration throughout the year.

---

## COMMITTEE SCOPE: CREDENTIALING PROGRAM

The purpose of the IAAO professional development committee is to develop criteria and standards for the following credentialing and professional development programs:

- **Certified Assessment Evaluator (CAE)** – The purpose of the CAE designation is to recognize professionalism and competency in a wide range of matters covering real property valuation for tax purposes, property tax administration, and property tax policy. Appraisal and assessment professionals may use this designation in conjunction with the valuation of a wide range of property types, assessment administration issues, and property tax policy statements in accordance with the IAAO commitment to excellence.
- **Residential Evaluation Specialist (RES)** – The purpose of the RES designation is to recognize professionalism and competency in the valuation of residential property for tax purposes. Appraisal and assessment professionals may use this designation in conjunction with the valuation of a wide range of property intended to be or used exclusively for residential purposes as it is customarily defined in their assessment jurisdiction in accordance with the IAAO commitment to excellence.
- **Cadastral Mapping Specialist (CMS)** – The purpose of the CMS designation is to recognize professionalism and competency in cadastral mapping techniques that support proper valuation for tax purposes, property tax administration, and property tax policy. Appraisal and assessment professionals may use this designation in conjunction with the production of maps and other graphic images and objects that support property appraisal and assessment administration in accordance with the IAAO commitment to excellence.
- **Personal Property Specialist (PPS)** – The purpose of the PPS designation is to recognize professionalism and competency in the valuation of personal property for tax purposes. Appraisal and assessment professionals may use this designation in conjunction with the valuation of a wide range of personal property as it is customarily defined in their assessment jurisdiction in accordance with the IAAO commitment to excellence.
- **Assessment Administration Specialist (AAS)** – The purpose of the AAS designation is to recognize professionalism and competency in the administration of a variety of functions for property tax purposes. Appraisal and assessment professionals may use this designation in conjunction with administrative and tax policy matters in accordance with the IAAO commitment to excellence.
- **Mass Appraisal Specialist (MAS)** – The purpose of the MAS designation is to recognize professionalism and competency in a wide range of matters covering mass appraisal theories, techniques, and application. Appraisal and assessment professionals may use this designation in conjunction with the mass valuation of a wide range of property types, assessment administration issues, and property tax policy statements in accordance with the IAAO commitment to excellence.
- **Professional Member** – The purpose of the Professional Member Program is to provide recognition to IAAO members who demonstrate a level of professionalism through education, experience, and adherence to standards and ethics.
- **Certificate of Excellence in Assessment Administration (CEAA)** – The purpose of the CEAA program is to recognize a jurisdiction's strong emphasis on teamwork, accomplishments, and an avenue of satisfaction among peers and constituents for excellent practices in governmental units utilizing best appraisal and assessment practices in their offices. IAAO CEAA recipients may use this certificate in accordance with the IAAO commitment to excellence.

# SECTION 2

## Committee Responsibilities

### Annual Responsibilities:

- Review and revise documents per Document Review Schedule
- Prepare items for following year budget—April
- Select Verne W. Pottorff Award winner
- Calculate Virginia Cup winner—first week in July
- Goals and task forces for following year—Fall Leadership Days

# SECTION 3

## Committee Tasks and Procedures

---

### DESIGNATION PROGRAM PURPOSE

The purpose of IAAO professional designations is to provide a program that recognizes professionalism and demonstrated competency in matters of property appraisal and assessment administration for tax purposes.

Any individual in the appraisal or assessment profession may apply for candidacy for any designation in the Professional Designation Program for which they qualify. Formal application for candidacy must be completed on the required application form and sent to IAAO headquarters with the appropriate fee and documentation of qualifications. Candidates must comply with the qualifications and requirements that are in effect at the time of their acceptance in the candidacy program.

Upon staff approval of the application, the candidate is sent the applicable checklists of specific requirements, including progress to date. The candidate is referred to a professional designation advisor who serves as a mentor throughout the candidacy process.

If any of the requirements set forth in these professional designation requirements are in conflict with the laws of any country, a request for a waiver, stating the conflict, is to be forwarded to the professional development committee for its consideration.

Applicants pay a fee upon application for application processing and candidacy program support. The application processing portion of the fee is nonrefundable if the application is denied. Upon approval, candidacies are approved for a period of five years. A candidacy may be extended once, for a period of one year, with the payment of an extension fee. Candidates may reapply for candidacy under the qualifications and requirements in effect at the time of reapplication.

## SUPPORT PROGRAMS/RESOURCES

### Professional Designation Advisors

Professional designation advisors (PDAs) are professional designees who have volunteered to share their expertise and knowledge of the program with candidates. New candidates are encouraged to connect with an advisor and are provided the resources to do so. The professional development committee keeps in close contact with the advisors.

### Candidates Clubs

Many states and provinces (and some cities or counties) have active clubs of candidates who are working together for a common goal. The clubs render assistance, support, and encouragement. IAAO headquarters maintains a list of clubs. Grants may be available to help start or develop a candidate's club. The professional development committee reviews applications.

### Jeff Hunt, CAE, Memorial Candidates Assistance Trust

This trust was established to assist those candidates who have a financial need in preparing reports or in meeting educational requirements. All grants must be requested on the proper application.

---

## DESIGNATION EXAMINATIONS

### Location and Date of Examinations

All professional designation program examinations may be taken at any location at any time. However, the comprehensive and master examinations may be taken only after all other requirements have been met.

### Examination Proctoring

All examinations must be proctored. A CAE designee is preferred in proctoring any examination. However, persons holding a specialty designation may proctor examinations in those specialties. The professional development committee may authorize a non-designee or remote proctoring service to proctor any examination. Proctors cannot be related to the candidate. Proctors must avoid any and all conflicts of interest or perceptions of impropriety.

Proctors are responsible for adhering to the Rules and Procedures for Examination Proctoring provided by IAAO for each examination session. Failure to do so may void the examination results and disciplinary action may be imposed by the professional development committee and/or the ethics committee.

Any proctor that has been suspended as a proctor by the professional development committee may request reinstatement as a proctor after their period of suspension.

## COMPREHENSIVE/MASTER EXAMINATIONS

### The CAE Comprehensive Examination

The CAE comprehensive examination is designed to test the candidate's knowledge of appraisal methodology principles and techniques and of assessment theory, practice, procedures, standards, and administration. The examination is given only after all general requirements have been satisfactorily completed. The candidate is allotted a maximum of eight hours for completion.

A candidate failing the comprehensive examination will receive a list of subjects to study based on the items answered incorrectly. The candidate may retake the exam after thirty days. If the candidate fails the re-examination, the candidate must wait 180 days for any subsequent attempt. A candidate may retake the exam for as long as they remain eligible.

### The Master Examinations (RES, CMS, PPS, AAS, MAS)

The master examination for the RES, CMS, PPS, AAS, or MAS designation is a test of competence, evaluating the candidate's knowledge of a specific subject. The examination is given only after all general requirements have been satisfactorily completed. The candidate is allotted a maximum of four hours for completion.

A candidate failing a master examination will receive a list of subjects to study based on the items answered incorrectly. The candidate may retake the exam after thirty days. If the candidate fails the re-examination, the candidate must wait 180 days for any subsequent attempt. A candidate may retake the exam for as long as they remain eligible.

---

## CASE STUDY EXAMINATIONS

### The Case Study Examinations

The Case Study Examination is designed to test a candidate's proficiency in, and mastery of the concepts deemed necessary for a designee. Approximately half of the questions pertain directly to the information presented in the case study and require the candidate to apply knowledge and perform calculations; the other half are general appraisal questions.

IAAO case study examinations are an intense, in-depth experience unlike other IAAO exams. Designation candidates are expected to have a mastery of the core course material and its application to real world situations. The candidate is allotted a maximum of eight hours for completion.

A candidate failing a case study examination will receive a list of subjects to study based on the items answered incorrectly. The candidate may retake it after thirty days. If the candidate fails the re-examination, the candidate must wait 180 days for a third attempt.

A candidate will have no more than three attempts at the Case Study Examination. If the candidate's third attempt is unsuccessful, they must complete another accepted project towards that designation.

### The Case Problem on Cadastral Mapping

The case problem on cadastral mapping is an eight-hour cadastral mapping exercise. The candidate is provided with a base map, aerial photograph, subdivision plat, and several deeds. The candidate must plot the deed and subdivision descriptions and resolve technical inconsistencies. Successfully completing the case problem requires technical and mapping problem-solving skills. The candidate is allotted a maximum of eight hours for completion.



A candidate failing a case problem examination may retake it after thirty days. If the candidate fails the re-examination, the candidate must wait 180 days for any subsequent attempt. A candidate may retake the exam for as long as they remain eligible.

---

## EDUCATION REQUIREMENTS

### Challenging Course Examinations

All IAAO course examinations, with the exception of Uniform Standards of Professional Appraisal Practice (USPAP) and Workshop 171: Standards of Practice and Ethics, may be challenged without the requirement of attending the class, but it is strongly recommended that all courses be taken with access to an instructor. Successfully challenged IAAO examinations may be applied to the qualifying educational requirements.

### Educational Equivalencies

#### Authorization

The Professional Development Committee may review the course offerings of university real estate programs for the purpose of approving educational equivalencies for student candidates of specific IAAO professional designations. Equivalencies will be documented and maintained in accordance with this policy manual.

The professional development committee may examine programs of appraisal organizations, associations, institutions, or government agencies and authorize IAAO educational equivalencies and/or demonstration appraisal report waivers.

#### Process

Designation equivalencies are considered through a review process where the IAAO Professional Development Committee considers the course offerings and descriptions of a program and how they compare to the IAAO courses required for a specific IAAO designation.

#### University of British Columbia Real Estate Program

- A. CAE, RES, and MAS candidates satisfactorily completing the Certificate Program in Real Property Assessment (CPRPA) (including BUSI 444), the Diploma Program in Urban Land Economics (DULE) (Assessment Specialization), or the Bachelor of Business in Real Estate Degree (BBRE) (Assessment Specialization) from the University of British Columbia may receive educational equivalencies for all IAAO educational courses required in the CAE, RES, and MAS program. AAS, CMS, and PPS candidates may receive educational equivalencies for the 100-level courses required for each of these designations.
- B. Candidates may receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of successful program completion, a copy of the report or other proof of completion, and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development department. UBC program completion is not required for the MAS program; individual courses with associated demonstration report completion is acceptable.
- C. Candidates are required to complete IAAO 171 Standards of Professional Practice and Ethics.
- D. Residents of the United States are required to take either IAAO 151 or a Foundation-approved two-day USPAP course. Examination cannot be challenged. Residents outside the U.S. must provide proof of passage of a course covering the particular appraisal standards that govern appraisers within their jurisdiction in lieu of taking either IAAO 151 or a Foundation-approved two-day USPAP course. In the absence of a local standard, USPAP is required.



- E. The BBRE is recognized as satisfying the bachelor's degree requirement for the CAE and Associate degree for the RES and MAS designations.

Contact: Executive Director, Real Estate Education at Sauder School of Business; info@realestate.sauder.ubc.ca, 604.822.2227

### **American Society of Appraisers (ASA)**

- A. Candidates holding the Ad Valorem/Mass Appraisal – General designation from the American Society of Appraisers (ASA) may receive educational equivalencies for IAAO courses 101, 102, 112, 300 and USPAP. Candidates may also receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of designation and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development committee.
- B. Candidates holding the Ad Valorem/Mass Appraisal – Residential designation from the American Society of Appraisers (ASA) may receive educational equivalencies for IAAO courses 101, 300 and USPAP. Candidates may also receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of designation, a copy of the report or other proof of completion, and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development department.

### **The Appraisal Institute (AI)**

- A. Candidates holding the MAI designation from the Appraisal Institute (AI) may receive educational equivalencies for IAAO courses 101, 102, 112, 201 and USPAP. Candidates may also receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of designation, a copy of the report(s) or other proof of completion, and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development department.
- B. Candidates holding the SRA designation from the Appraisal Institute (AI) may receive educational equivalencies for IAAO courses 101, 102, 201 and USPAP. Candidates may also receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of designation, a copy of the report(s) or other proof of completion, and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development department.

### **The Appraisal Institute of Canada (AIC)**

- A. Candidates holding the Accredited Appraiser Canadian Institute (AACI) designation from the Appraisal Institute of Canada (AIC) may receive educational equivalencies for IAAO courses 101, 102, 112, 201 and USPAP. Candidates may also receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of designation, a copy of the report or other proof of completion, and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development department.
- B. Candidates holding the Canadian Residential Appraiser (CRA) designation from the Appraisal Institute of Canada (AIC) may receive educational equivalencies for IAAO Courses 101, 102, 201 and USPAP. Candidates may also receive credit via waiver(s) for comparable demonstration appraisal report(s) by submitting proof of designation, a copy of the report or other proof of completion, and an Application for Demonstration Narrative Appraisal Report Waiver to the professional development department.

### **Additional Equivalencies/Waivers**

- Candidates holding active certifications, designations, or licenses not listed may receive IAAO educational equivalencies by submitting proof of certification, designation, or license, course curriculum at the time of completion, and proof of course completion to the professional development committee.

## EXPERIENCE REQUIREMENTS

The candidate must demonstrate they possess the experience required to qualify for the designation sought. General experience is not applicable. The **Experience Record Form** is required to demonstrate the candidate's experience.

---

## DEMONSTRATION REQUIREMENTS

### The Demonstration Appraisal Report

The purpose of the demonstration appraisal report is to demonstrate the candidate's knowledge of the principles of the appraisal process and the ability to clearly explain the reasoning that led to a final value conclusion. The professional development committee maintains [\[official guides\]](#) for writing demonstration reports.

All real property demonstration appraisal reports must be accompanied by the data verification form. This form requires factual data on the comparable properties used in the report. All information submitted is subject to verification.

It is suggested the candidate complete all educational requirements before writing and submitting the demonstration appraisal report. An appraisal report must be based on an existing property or group of properties. An appraisal report must include all three approaches to value, properly executed and explained in the writing guide. The judgment of the committee will be based upon how the candidate demonstrates competency in the appraisal process.

The effective date of the appraisal in the demonstration appraisal report must be within five years of the date the report is submitted to IAAO. Candidates are advised of the status of the report and the recommendations of the professional development committee. No numerical grades are released for the demonstration appraisal reports; all are on a pass/fail basis. Failed reports may only be revised once and must be re-submitted within one year of notification. A demonstration appraisal report that has failed twice must be reviewed under the direction of the professional development committee chair before the results are released to the candidate. After a second failed attempt, the candidate must choose a different subject property for submission.

### The Computer-Assisted Valuation Report

The candidate choosing this option is required to prepare a demonstration appraisal report utilizing the computer-assisted valuation technique. This report must demonstrate the candidate's expertise in developing, applying, and maintaining computer-based mass appraisal systems. The report must focus on the application of computer-based statistical modeling techniques being applied to a mass valuation of a group of properties. Proper assessment ratio techniques must be applied in analyzing assessment equity before and after the valuation. The valuation of the subject properties must be accomplished by applying proper model development and calibration techniques. The assessment-ratio study procedures, valuation procedures, and achieved measures of assessment level and equity must meet appropriate standards.

Specific information on the requirements for this report is contained in the [\[Guide to Real Property Demonstration Mass Appraisal Report Writing\]](#). Candidates choosing this option must read and carefully follow the instructions in this guide before developing the demonstration report.

The computer-assisted valuation report is graded according to the methods used in grading other demonstration appraisal reports. No numerical grades are released. Computer-assisted residential valuation reports are scored on a pass/fail basis only. Failed reports can be revised only once and must be re-submitted within one year of notification. A demonstration appraisal report that has failed twice must be reviewed under the direction of the professional development committee chair before the results are released to the candidate. After a second failed attempt, the candidate must choose a different universe of properties for submission.

## Appeals

A demonstration appraisal report that fails on second grading may be appealed to the professional development committee. The appeal must be on the proper form, must be signed by the candidate, and must identify the specific areas appealed.

---

## GRADERS

The professional development committee appoints graders of demonstration appraisal reports and the case problems and appoints grading chairs for residential, commercial, personal property reports, and for the case problems.

The professional development committee provides grader training online or at the IAAO Annual Conference. Real property report graders must complete a grading workshop once every three years in order to be an approved grader. Inactive graders are only permitted to grade with express permission of the professional development committee.

To become a real property report grader, an individual must hold the CAE, RES, or MAS; have passed a demonstration appraisal report in the grading area; attend a grading workshop; successfully grade a sample report; and be approved by the professional development committee.

---

## AWARDING THE DESIGNATION

After all requirements for the professional designation have been completed, candidates must submit an affidavit stating that, if designated, they will abide by the IAAO Code of Ethics and Standards of Professional Conduct, and by all Procedural Rules. The candidate for a designation will be presented to the professional development committee to confer the appropriate designation at a committee meeting.

---

## EVIDENCE OF THE DESIGNATION

A certificate of designation and a designation lapel pin are issued to each designee certified by IAAO. The certificate of designation, the designation lapel pin, and other such evidence of the designation issued at any time to a designee, remain the permanent property of IAAO and must be returned promptly to IAAO when the individual is no longer qualified as a designee or upon request of the board of directors.

The designation logo shall not be used in any manner on letterhead, business cards, and the like without it being affixed as an identifier to the name of the individual on whom the designation was conferred. Questions concerning the use of the designation logo must be forwarded to the professional development department.

Individuals who have been awarded the CAE, RES, CMS, PPS, AAS, or MAS professional designation should identify themselves with the official abbreviation of their designation. The official abbreviations are as follows: “CAE” for the words Certified Assessment Evaluator; “RES” for the words Residential Evaluation Specialist; “CMS” for the words Cadastral Mapping Specialist; “PPS” for the words Personal Property Specialist, “AAS” for the words Assessment Administration Specialist; and “MAS” for the words Mass Appraisal Specialist.” The abbreviations shall not have periods between the letters.

An individual may hold any combination of the CAE, RES, CMS, PPS, AAS, and MAS designations simultaneously.

It shall be unlawful for any person, firm, or corporation to use or display in any form an IAAO designation logo without the expressed written consent of the IAAO. IAAO reserves the right to prosecute violators.

## MAINTAINING THE DESIGNATION

### Recertification Requirements and Procedures

This program ensures that the professional designee will always have an avenue of continuing education that will keep abreast of the changes and advancements being experienced by the profession. The objective of the recertification program is to encourage and require continued professional advancement, ensuring continued exposure to new developments in the field, thereby further guaranteeing the designee meets and continues to meet all educational requirements of IAAO and/or The Appraisal Foundation.

The program requires designees to meet specific requirements for recertification as set forth in the Procedural Rules. Inclusive with the required total credit hours are those hours specified in the Procedural Rules. Obtaining recertification credit is based on the designee successfully completing structured educational programs or participating in other approved activities as specified within the rules.

Designees who demonstrate they meet the requirements to recertify will be recertified at the end of each five-year recertification cycle. Designees may not be recertified earlier than the end of the recertification cycle. Education programs for which recertification credit is sought must be successfully completed within that recertification cycle, unless otherwise determined by the professional development committee. Published articles for which recertification credit is sought must have been originally published within that recertification cycle. Previously earned credits cannot be transferred to the new cycle.

---

## QUALIFYING CONTINUING EDUCATION

Education programs that meet the requirements for recertification credit include local, state, provincial, national or international courses, seminars, workshops, symposia, or any university or college course on subjects related to appraising, assessing, cadastral mapping, property tax policy, or assessment administration. Organizational business meetings, committee meetings, or social functions are specifically excluded. Recertification credit hours for a single program may vary from one to forty-five.

University or college courses considered to be related to appraisal and assessment administration include, but are not limited to, accounting, building and construction, business law, data processing, drafting, finance, management, mathematics, public administration, real estate law, statistics, surveying, or geographical information systems (GIS). All university/college courses may be considered by the professional development committee on a case-by-case basis and require the applicant to submit a listing of course materials and a course outline for approval.

---

## CLAIMING CREDIT

For educational program attendance, the Uniform Request for Recertification Credit Form as approved by the board of directors or other proof of completion from the provider either must be submitted or retained in the designee's file and provided to the professional development department upon request.

Unique or unusual education hour requests shall be forwarded by the professional development department to the professional development committee for review. The applicant will be notified of the number of recertification credit hours approved. As several organizations use the Uniform Request for Recertification Credit Form, each organization requires an individual form to be filed for credit consideration.

In requesting recertification credit for a published article, the designee must send a written request to the professional development committee. The request should contain the full title of the article, the full name, volume

number, and date of issue of the publication in which the article appeared, and the number of hours spent researching and writing the article. The designee shall also include proof of publication, such as the contents page of the publication that lists the article and include a copy of or link to the article. The professional development committee will review submitted articles and determine appropriate credit. All decisions of the professional development committee are final.

## Compassionate Leave

A designee who is unable to work for an extended period of time due to medical reasons or serious family matters (e.g. serious illness, bereavement, maternity/parental leave) may submit to the professional development department a request for compassionate leave for a period of one year. Upon approval by the professional development committee, the professional development committee will amend the designee's recertification cycle and waive designation dues accordingly. Should the designee require additional time, a request for extension may be submitted annually.

---

## RETIRED STATUS

- Professional designees no longer using the designation as a credential in assessment or appraisal work shall be exempt from mandatory recertification upon approval of the professional development committee.
- A professional designee wishing to retire their designation(s) in good standing must submit a request to IAAO which will seek approval from the Professional Development Committee.
- Retired designees are designees in good standing in IAAO who are no longer active in, or receive any fees or wages from, any appraisal practice defined in USPAP or local applicable standards.
- Retired designees may not instruct for compensation or co-sign any report resulting from appraisal practice assignment.
- The annual designation dues are reduced; however, failure to pay dues results in termination of the designation(s).
- Retired designees must always include the word "Retired" with any reference to their IAAO designation, e.g., CAE (Retired) or RES (Retired).
- IAAO retired designees continue to be eligible to volunteer on IAAO committees.
- A retired designee must agree to immediately notify IAAO of changes to their contact information or employment status while an active, retired designee.
- Retired designees who wish to return to an active status must comply with the terms of the Reinstatement Policy.

## DESIGNATION TERMINATION

Professional designations will be automatically rescinded for those who do not comply with recertification requirements.

When the designation of an individual is rescinded or inactive for any reason, the individual shall not use or display the designation in signing correspondence or stating qualifications, in credentials for appraisal reports, or in any other manner. The name of any such persons shall be removed from the list of professional designees and shall be prohibited from using and/ or claiming any rights and privileges accruing to IAAO professional designations. All use of the designation, pin, certificate, logo, identification card, etc. shall cease immediately, and IAAO reserves the right to require, at the individual's cost, the return of all such items.

The board of directors may terminate any designation for just cause. Notice shall be sent advising the former designee of the termination. The notice shall contain language regarding the rights and process for appeal and reinstatement.

---

## DESIGNATION REINSTATEMENT

### Routine Reinstatement

To reinstate a designation rescinded for failing to meet maintenance requirements, including payment of annual dues and recertification, designation reinstatement may be permitted under the following provisions: the designation may be reinstated administratively if the requirements are satisfied within the same calendar year as the rescission. Any other designation reinstatement request must be in writing, and the professional development committee will review such request and make a determination. With approval of reinstatement, the reinstated designee will enter a recertification cycle, which cycle will be the same as when the designee was last active. Such reinstatement may require the designee to be granted an extension of one year.

As cited above, to be considered for reinstatement, a written request to the professional development committee explaining the circumstances and the reasons for reinstatement shall be submitted. The request shall also describe any professional activities and continuing professional education since the designation was rescinded. The professional development committee shall evaluate the request and specify the requirements necessary to gain reinstatement. The committee may require additional information and may impose additional requirements.

### **Considerations for reinstatement shall include but are not limited to the following:**

- Continuing education credits that would have been required to maintain a designation during rescission
- Additional courses required to attain the designation since rescission
- Involvement in the profession since rescission
- Significant change to course content or requirements
- Current year designation dues plus a reinstatement fee equal to the designation dues per applicable designation

The professional development committee shall communicate its decision and any requirements in writing. The person may appeal the professional development committee's decision to the board of directors by submitting an appeal in writing to the executive director, outlining the reasons they believe the professional development committee's decision was in error.

## **Board Action Reinstatement**

To reinstate a designation resulting from a decision of the board of directors for just cause, the person shall in writing to the executive director:

- Disclose the reasons for the termination of the use of the designation;
- Describe professional activities and continuing professional education since the designation was terminated; and
- Provide any applicable evidence for reinstatement.

This request shall be referred to the professional development committee for review and recommendation to the board of directors. The professional development committee shall evaluate the request, may request additional information, and may recommend additional requirements to the board. The board shall communicate its decision and, if the request for reinstatement is denied, the reasons for the denial. The request for reinstatement may be resubmitted when the reasons for the denial have been satisfactorily addressed.

# **SECTION 4**

## **Professional Member Program**

### **Renewing the Status**

Payment of an annual fee is required to maintain this status.

### **Termination**

Failure to pay annual fees shall result in automatic termination of IAAO Professional Member status.

When the IAAO Professional Member status of an individual is terminated or relinquished for any reason, the individual shall cease the use and display the IAAO Professional Member status.



# SECTION 5

## CEAA Program

- A. For those jurisdictions desiring to participate in the Certificate of Excellence in Assessment Administration Program (CEAA), an application must be submitted with the required fees.
- 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 candidate 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. IAAO will endeavor to grade the submission within ninety calendar days from the candidate jurisdiction's submission date. The deadline for submission is April 1 to be recognized at the annual conference in a given year.
- D. The candidate jurisdiction must be an appraisal and assessment agency and not solely an oversight agency.
- E. A candidate jurisdiction seeking the CEAA may use outside assistance from those who are not permanent members of the jurisdiction's staff. The scope and duties of the outside assistance will be limited to the administration and the preparation of the CEAA report such as 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.

Those providing outside assistance must be under the direct supervision and control of the primary officer responsible for the preparation of the CEAA report. They are to work in close contact with an individual(s) or committee(s) appointed or established by the candidate jurisdiction pursuing the CEAA. All work performed under the agreement must be original for the candidate jurisdiction and no "canned" or plagiarized material shall be included. The responsibility for the final preparation of the report may not be delegated by the candidate jurisdiction to those who provide outside assistance.

An application must be submitted with the accompanying fees as required. IAAO will provide the candidate jurisdiction 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

---

## CEAA MENTORS

A mentor will be assigned to each candidate jurisdiction applying for the CEAA by the professional development committee chair upon application. The mentor will have completed the CEAA process and maintained the certification in an approved status or attended the CEAA mentor training or have been an active past member of the former CEAA subcommittee.

A mentor provides guidance and support to the candidate jurisdiction throughout the process. The mentor does not work for the candidate jurisdiction and does not do the work for them. An initial meeting or call should be held prior to beginning work. Other individuals may be included in the meeting at the candidate jurisdiction's request.

## CEAA GRADING

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 guide (see the shaded text at the end of each question in the guide), the candidate jurisdiction shall submit the completed responses using the electronic template and completion fee as listed in CEAA program fee structure to the IAAO.

A grader or panel of graders shall be assigned by IAAO to evaluate the submission for accuracy, completeness of information, and all supplemental documentation. All questions are graded on a sliding scale, and partial credit may be given. The review and evaluation must find the candidate jurisdiction's response to each question compliant or better to receive the points allocated to each question. To receive the CEAA, a score of 80 percent or higher must be received for each relevant chapter. Chapters that are not considered relevant are those that have no application to the work and activities of the jurisdiction. These could include activities that the jurisdiction does not perform because of pertinent state law or regulation. For example, in some jurisdictions, personal property in whole or part is not taxable. Those questions related to personal property should not be included in the report or application. Jurisdictional exception questions that are to be omitted must be identified in the letter of transmittal as irrelevant and not applicable within the jurisdiction.

If a candidate jurisdiction does not receive a score of 80 percent or higher on any chapter(s), they will be notified and given the opportunity to revise the submission. After three unsuccessful attempts. If a candidate jurisdiction fails the resubmission process, they will be required to submit a new application with a new year of compliance and applicable fees.

Successful jurisdictions shall be awarded a plaque by IAAO honoring the jurisdiction with the IAAO Certificate of Excellence in Assessment Administration. The IAAO shall prepare for distribution a short news release for local publication, an article for Fair & Equitable; and a notice to any local associations or IAAO chapters. The IAAO will also provide formal recognition at the annual conference, including: a name badge ribbon for each of the jurisdiction's attendees and formal recognition for all jurisdictions that achieve certification during the prior year similar to that given to new designees.

---

## CEAA RECERTIFICATION

All certificate holders must apply for recertification after the completion of their fifth year and will have one year to submit the necessary documents. The recertification documentation will include a letter of transmittal, a spreadsheet of continued education hours, four rewritten and updated chapters, and a summary of material changes in the previous five years, as follows:

1. The recertification candidate shall provide IAAO with a spreadsheet showing that education averaged at least 14 hours per appraisal professional per year over the five-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. Education programs that meet the requirements for recertification credit may include local, state, provincial, national or international courses, seminars, workshops, symposia, or any university or college course on subjects related to appraising, assessing, cadastral mapping, property tax policy, or assessment administration. Organizational business meetings, committee meetings, or social functions are specifically excluded. Recertification credit hours for a single program may vary from one to forty-five. IAAO highly recommends tracking all educational hours throughout the 5-year period.

2. The candidate must rewrite four chapters in the Assessment Practice Self-Evaluation Guide, excluding Chapter 1. Four new chapters must be selected each renewal cycle until all twelve chapters are rewritten.
3. The recertification candidate will prepare a Summary of Material Changes since their last certification and the effect on the office including any significant changes in tax policy (local or state/provincial), technology, management, organization, and staffing.

Certified jurisdictions may be 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.

## SECTION 6

# Committee Documents

- Document Review Schedule (IAAO Connect PDC Library)
- [Designation Experience Requirement Guidance](#)
- Professional Designation Advisor Handbook (IAAO H Drive)
- Demonstration Report Guides
- Demonstration Report Graders' Handbook (IAAO H Drive)
- Assessment Practices Self-Evaluation Guide, 5th Edition (IAAO H Drive)
- CEAA General Procedures (IAAO H Drive)
- CEAA Instruction Manual (IAAO H Drive)
- CEAA Mentor and Grading Guide (IAAO H Drive)

# ABOUT IAAO

The International Association of Assessing Officers, formerly the National Association of Assessing Officers, was founded for the purpose of establishing standards for assessment personnel. IAAO is a professional membership organization of government assessment officials and others interested in the administration of the property tax. Over the years IAAO members have developed assessment practice and administration standards and many of these standards have been adopted by state and international oversight agencies, and some have been incorporated into legislation.

IAAO continues at the forefront of assessment in North America and has been expanding its reach to the global community for the last five decades. Because standards form the rules by which North American assessors perform their duties, they may not be directly applicable to an overseas audience. The standards have been updated to also present the broad principles upon which the rules are based. IAAO believes those principles may be adapted to many differing statutory and regulatory scenarios worldwide.