

THE VIRTUOSO

A Newsletter of the Institute of Government's Candidates' Club

RECEIVED

NUMBER 2, SEPTEMBER 1984

JAN 27 1986

JOSEPH E. HUNT, EDITOR

UNIVERSITY OF NORTH CAROLINA

LIBRARY

FIRST CANDIDATES' CLUB MEETING IS OVERWHELMING SUCCESS!

Fifty people attended the Institute of Government's Candidates' Club meeting held on May 7-8 in Chapel Hill--over 80 per cent of the club's total membership. This type of participation virtually assures the club's success in achieving its goal of professional recognition of assessment administrators in North Carolina.

The agenda for the meeting was designed to identify the requirements for becoming professionally designated in the State of North Carolina and in the International Association of Assessing Officers' professional designation program. Douglas Holbrook, Director of the state's Ad Valorem Tax Division, explained the certification requirements for county assessors and county appraisers as set forth in Ch. 813 (H 202) of the 1983 Session Laws, and Bobby Miller, Tax Supervisor for Catawba County, outlined the professional designation program of the North Carolina Association of Assessing Officers. Special guest Dean McQuown, Director of IAAO's professional designation program, reviewed that program's entry and achievement requirements for the professional designations of Certified Assessment Evaluator (CAE) and Residential Evaluation Specialist (RES).

Among the many helpful topics offered, perhaps the most popular was Sara Claytor's workshop on effective techniques for writing appraisal

reports. Demonstration report writing continues to be one of the major stumbling blocks to achieving the CAE or RES designations; consequently, the group was particularly attentive to Sara's part of the program. Everyone will be happy to learn that she has agreed to participate in future Candidates' Club meetings and will be a regular contributor to the club newsletter.

Thanks to a number of the professionals in North Carolina who currently hold the CAE designation, aspiring members who attended the meeting were able to take a glance into the future. With Harry Schultz, CAE from Mecklenburg County, acting as moderator, a panel of North Carolina CAEs shared their experience in obtaining the CAE designation and told about what attaining the designation has meant to each of them as an individual. The panel members then answered questions from the group.

Future programs and events for the Candidates' Club are now being planned. A panel of advisers is being assembled that will permit an adviser to be assigned to each candidate. Candidates will find it useful to have a direct line to someone who has already traveled the path to designation and can answer questions and help the candidate plan his or her activities. Lockups are also being considered. A lockup is a program in which candidates attend a seminar on a particular phase of candidate requirements and leave with the work of that phase completed.

Lockups will cover a wide range of subjects--from becoming a candidate to writing parts of the appraisal report. Also, an ongoing data bank for the exchange of research data will be organized to provide a wealth of information for use in demonstration report writing; the information will include supporting market data and examples of appraisal applications and techniques. These and other programs will be announced as they develop.

The next Candidates' Club meeting will be held in December. Details and a pre-registration form may be found in this newsletter. Perhaps attendance will rise to 100 per cent.

NUMBER OF CAE/RES CANDIDATES
IN NORTH CAROLINA NOW AT EIGHTEEN

More new North Carolina candidates have been accepted by IAAO in 1984 than in any previous year. The total number of designated CAEs in North Carolina now stands at ten. At present there are no RES members in the state. In this year alone, ten new candidates for CAE or RES designations have been approved by IAAO's professional program. This brings the total number of candidates in North Carolina to eighteen. The following is a list of these candidates by order of date approved.

<u>Name</u>	<u>Type</u>
Michael W. Collier	CAE
John G. Korinis	CAE
William E. Stevens	RES
Ralph F. Neely, Jr.	RES
Ralph D. Warlick	RES
Stillman F. Westbrook	CAE
Jerry F. Grant	CAE
Perry M. Grant	RES

Deborah Z. King	CAE
Thomas L. Tucker	CAE
David A. Turbyfill	RES
James L. Smith	RES
James J. Autry, Jr.	RES
John Capewell	CAE
Randall W. Moose	CAE
Nolan K. Palmer	CAE
Mary Jean Presnell	RES
Douglas G. Elliott	CAE

Now is the time to become part of this growing list. To become a candidate, you must be a member in good standing of IAAO and apply for candidacy. If you are not now a candidate and are planning to attend the next Candidates' Club meeting in December, you will be assigned to the session on becoming a CAE/RES candidate. Bring with you the "Application For Professional Designation Candidacy" form (at the end of this newsletter), along with a copy of your educational certificates, other professional designation certificates, and appropriate fees (\$25 application fee and \$45 IAAO membership fee), and you can leave the session with all requirements for candidacy completed, signed, and in the mail to IAAO.

SAGACITY FROM SARA

Just a review for all of you who are still plugging away for your professional designations and eagerly looking forward to your Narrative Appraisal Report. Remember that coherence, paragraph development, and clarity of language and thought are most important in any effective report presentation. Be sure to define terms used for property appraisal in each segment or division of your report. I hope you kept the handouts given at the May conference in a safe place. They make more sense when you reach the final

preparation-for-writing stages. If you would like a handbook as guide, may I suggest one or more of the following:

Himstreet, William C., and Wayne M. Baty. Business Communication. Boston: Kent Publishers, 1984.

Houp, Kenneth W. and Thomas Pearsall. Technical Information. 5th Ed. New York: MacMillan, 1984.

Wilkinson, C. W., and Peter B. Clarke, eds. Communicating Through Letters and Reports. 8th Ed. Homewood, Ill.: Richard E. Irwin, Inc., 1980.

I look forward to meeting and re-meeting you at the December meeting.

Sara Claytor

DON'T FORGET!
CANDIDATES' CLUB MEETING
INSTITUTE OF GOVERNMENT
DECEMBER 17-18, 1984

SAMPLE DEMONSTRATION REPORTS DROPPED
(reprint, IAAO PDP News, June 1984)

At its March 1984 meeting, the IAAO Executive Board voted to remove from distribution all IAAO sample demonstration appraisal reports. In taking this action the Executive Board also advises candidates that the existing sample reports should not be utilized in the future. IAAO graders will no longer consider the published sample demonstration appraisal reports appropriate reference documents to use in grading candidate's reports; likewise, the

candidate should not rely on the published reports for justification of conclusions reached in his own report.

Candidates are reminded that the official set of guidelines for real property demonstration appraisal reports is "Guide to Real Property Demonstration Appraisal Report Writing." A subcommittee of the Professional Admissions Committee, chaired by John Crissey, CAE, is currently working on updating and expanding this guide.

NEXT INSTITUTE OF GOVERNMENT'S
CANDIDATES' CLUB MEETING
SET FOR DECEMBER 17-18, 1984

The Candidates' Club will next meet at the Institute of Government on the UNC campus in Chapel Hill on December 17-18. The meeting will begin at 1:00 p.m. on Monday, December 17, and end at 1:00 p.m. on Tuesday, December 18.

On Monday the club members will be broken into two groups. Those who are not already candidates for one of IAAO's designations will attend a work session on Becoming a CAE/RES Candidate, while candidates will attend a session on Writing the Demonstration Appraisal Report. Both sessions are designed to meet the needs of those who attend.

Tuesday will be a joint session, starting with a writing workshop by Sara Claytor and concluding with a business meeting to discuss club goals and objectives and elect a club steering committee. If you plan to attend, please complete the enclosed Application for Attendance, and return the application as instructed on the form. If you plan to stay at the Institute of Government, make

reservations on the enclosed housing form. Let's everyone plan to attend.

Meeting of the
CANDIDATES' CLUB
December 17-18, 1984
Institute of Government
The University of North Carolina
at Chapel Hill

TIME AND PLACE: The Candidates' Club will meet on December 17-18, at the Institute of Government, The University of North Carolina at Chapel Hill. The meeting will convene at 1:00 p.m. on Monday, December 17, and conclude at 1:00 p.m. on Tuesday, December 18.

PROGRAM: Program topics include:
Lockup Session:
Becoming a CAE/RES Candidate
Writing Demonstration
Appraisal Reports
Writing Workshop
Business Session

REGISTRATION FEE: A fee of \$1 per person will be charged to pay for coffee and Cokes at breaks.

Participation in Institute schools and conferences is without regard to race, color, sex, religion, national origin, handicap, or veteran status.

A total of 260 copies of this public document were printed by the Institute of Government, The University of North Carolina at Chapel Hill, at a cost of \$46.96, or \$.18 per copy. These figures include *only* the direct costs of reproduction. They do not include preparation, handling, or distribution costs.

Application for Attendance

REGISTRATION FORM
The Institute of Government's Candidates' Club

Mail to: Joseph E. Hunt
Institute of Government, Knapp Building 059A
UNC at Chapel Hill, Chapel Hill, NC 27514

Name _____ Social Security # _____

Title _____ County _____

Address _____

City _____ State _____ Zip _____

A fee of \$1 to cover coffee and Cokes at breaks is payable at registration.

IAAO OFFICE USE ONLY

File No. _____ Date Approved _____ Membership _____ Track _____ Option _____

INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS
APPLICATION FOR PROFESSIONAL DESIGNATION CANDIDACY

Application for:

- RES (Residential Evaluation Specialist)
- CAE (Certified Assessment Evaluator)--Real Property Track
- CAE (Certified Assessment Evaluator)--Personal Property Track

CAE only: I elect to take the case problem examination option _____ Yes _____ No

If you are applying for candidacy for the Certified Assessment Evaluator (CAE) designation but wish to qualify for the Residential Evaluation Specialist (RES) designation prior to completing all requirements for CAE designation, check the box for RES candidacy. If you intend to qualify only for the CAE designation, check one of the CAE boxes and indicate your case problem election. (This election can be changed at a later date.)

(Please type)

Name _____ Date of Birth _____

Title _____ Social Security Number _____

Jurisdiction/Firm _____

Office Address _____ Phone _____

City _____ State/Province _____ Zip _____

Home Address _____ Phone _____

City _____ State/Province _____ Zip _____

Preferred mailing address (check one): _____ Office address _____ Home address _____

List national/international professional assessment/appraisal organizations of which you are a member:

List national/international professional assessment/appraisal designations that you presently hold. Please enclose copy of certificate or other document showing evidence of designation:

Education

High School Graduated? _____ Yes _____ No Year graduated _____

Name Location Year: to-from Major Degree

College: _____

List appraisal/assessment administration courses successfully completed and dates of completion. Please attach copy of certificate or other document showing evidence of successful completion of the courses listed.

CERTIFICATION AND AGREEMENT

I, _____ the undersigned, hereby apply for admission to candidacy for the professional designation: CAE RES I certify that the information given in this application is true and correct. I agree that any information requested of me by the Professional Admissions Committee in the future will be timely submitted and will be true and correct.

It is agreed that the designation, if conferred upon me, and any certificate or emblem of designation, shall at all times remain the property of IAAO, held by me in trust, and will be returned to IAAO upon demand of its Executive Board.

I enclose the sum of \$25.00 to cover the admission fee. It is understood that the \$25.00 admission fee will be refunded to me in full in the event that I am not admitted to candidacy. I understand that in order to maintain my candidacy I will be charged an annual candidacy maintenance fee (currently \$15.00).

It is agreed that if I am certified as a CAE or RES I will pay the annual dues as fixed by the Professional Admissions Committee and approved by the Executive Board.

It is agreed that I will abide by the rules of the Professional Admissions Committee concerning the use and evidence of the professional designation that I may be awarded.

In submitting this application, I state to IAAO that there are not now any outstanding material challenges to my professional responsibility, character, or integrity pending against me, except as explained in the attached statement dated _____.
(If none, insert the word "none" in the preceding space.)

Signed _____

Date _____

RECOMMENDATION OF IAAO PROFESSIONAL DESIGNEE

I, _____ CAE, RES, either through the best of my knowledge of the applicant, or by checking with reliable sources, hereby attest to the statements contained in this application.

I understand the importance of the accuracy of the statements contained herein, and I am aware that if any of the statements are in error and I am found willfully negligent in signing this application, I may be censured by the IAAO Executive Board.

Signed _____

Date _____

NOTE: In the event that after a reasonable amount of effort the applicant cannot locate a CAE or RES to sign this application, the applicant shall send the application to the IAAO office unsigned.