

THE VIRTUOSO

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

Number 6, January 1988

Richard Beamer, Editor

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INSTITUTE OF GOVERNMENT
UNIVERSITY OF NORTH CAROLINA

NORTH CAROLINA STATE DESIGNATION PROGRAM

The North Carolina Association of Assessing Officers recognized five new North Carolina Certified Appraisers at their annual fall conference held November 19-20, in Chapel Hill. Roger Cotten, the 1987 president of NCAAO, awarded the designations to the recipients at the conference awards banquet. Receiving designations were: John G. Korinis, Mecklenburg County; John W. Erhardt, North Carolina Department of Revenue; Randall W. Moose, Catawba County; Jackson A. Cumby, Forsyth County; Debra P. Hill, Randolph County; and Perry M. Grant, Bladen County. Also recognized were new designees in the IAAO professional designation program. Richard Beamer, CAE, and Don Irvin, RES, both from Mecklenburg County, earned their IAAO designations during the past year.

The NCAAO Professional Designation Program was started in 1980 to recognize assessors who had demonstrated professional competence at their appointed positions. The professional designation North Carolina Certified Assessor was created. Qualifications for the designation are (1) regular or associate membership with the NCAAO; (2) five years experience in an assessor's office; (3) having conducted a county-wide reappraisal, and (4) successful completion of a series of courses in property tax law, valuation, and administration. Since the programs' inception, thirty-two assessors have been certified.

In 1983 the NCAAO Professional Designation Program was extended to appraisers. Since that time thirty-two appraisers have qualified for the designation. Like the assessor designation, applicants for the North Carolina Certified Appraiser must (1) be a regular or associate member with the NCAAO; (2) have five years experience in an assessment office or the North Carolina Department of Revenue, with three years experience in the appraisal of real property, and (3) successfully complete a series of courses.

Altogether, three opportunities for certification and professional recognition are available to North Carolina assessment personnel: the North Carolina Certification requirement, the North Carolina Association of Assessing Officers professional designation program, and the International Association of Assessing Officers professional designation program. The mandatory state certification requirement is required by SS105-294 and SS105-296 in the Machinery Act of North Carolina. The other two professional programs of NCAAO and IAAO are voluntary. Additional information about these programs may be obtained at the following places:

PROGRAM

CONTACT

North Carolina
certification requirements

North Carolina Department of Revenue.
Ad Valorem Tax Section
Post Office Box 25000
Raleigh, NC 27640
Frank Goodrum, Director
(919) 733-7711

North Carolina Association of
Assessing Officers professional
designation program

Institute of Government
CB# 3330, Knapp Building
University of North Carolina at
Chapel Hill
Chapel Hill, NC 27514
Joseph E. Hunt, MAI, CAE
(919) 966-4372

International Association of
Assessing Officers professional
designation program

IAAO
1313 East 60th Street
P.O. Box 88874
Chicago, IL 60680-1874
Dean A. McQuown, Director, PDP

The North Carolina Candidates' Club was formed to help North Carolina assessment administrators achieve professional recognition. If you are interested, join the club. The dues are \$10.00 per year for regular membership. If you are interested in becoming a member of the Candidates' Club, just clip and complete the following application and mail it to: Debbie King, 6245 Gold Waggon Lane, Charlotte, NC 28212.

CANDIDATES' CLUB

Name _____ Date of Birth _____

Title _____ Soc. Sec. No. _____

County _____

Office Address _____ Phone () _____

City _____ State _____ Zip _____

Home Address _____ Phone () _____

City _____ State _____ Zip _____

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

Are you now a member of IAAO?: _____ Yes _____ No

IRVIN RECEIVES RES DESIGNATION

On July 10, 1987, Don Irvin received his Residential Evaluation Specialist (RES) designation from the IAAO. Don completed his requirements in the spring of 1987.

Don has been employed as an Appraiser II with Mecklenburg County since July 15, 1987. Prior to this, he was an appraiser with Cabarrus County from August 1977 until August 1985. He has done part-time fee appraisals serving HUD and local lending institutions and is also a licensed North Carolina Real Estate Salesman. Don has successfully completed IAAO courses 1 and 2 and has a B.S. degree in Business Administration from Steed College in Johnson City, Tennessee.

CONGRATULATIONS, DON!

CANDIDATES' CLUB MEMBERSHIP DUES

Dues for Candidates' Club membership are renewable for one year and are due January 1, 1988. Membership dues are \$10.00 for regular members and \$20.00 for subscribing members. Checks should be made payable to THE NORTH CAROLINA CANDIDATES' CLUB and mailed to: Debbie Z. King, RES, 6245 Gold Wagon Lane, Charlotte, NC 28212. Dues may also be paid at the next Candidates' Club meeting on February 22-23, 1988.

Anyone who is interested in obtaining the IAAO professional designation of CAE or RES is invited to attend.

FUTURE CLUB MEETING DATES SET

Meeting dates for 1988 have been selected by the Candidates' Club steering committee. All meetings will be held at the Institute of Government in Chapel Hill. The meetings will begin at 1:00 P.M. and will adjourn the next day at noon. Spring meetings will feature guest speakers while fall meetings will focus on report-writing workshops. Future meeting dates are as follows:

<u>YEAR</u>	<u>MONTH</u>	<u>DATES</u>	<u>DAYS</u>
1988	February	22-23	Monday/Tuesday
1988	November	3-4	Thursday/Friday

REPORT-WRITING WORKSHOP HIGHLIGHTS OCTOBER CLUB MEETING

The North Carolina Candidates' Club met in Chapel Hill on October 1-3, 1987. As is customary for fall meetings, this meeting was a workshop on writing demonstration appraisal reports. Debbie King, RES, covered various sections of the report, including the title page, letter of transmittal, city data analysis, and neighborhood data analysis. Ralph Neely, CAE, discussed

the cost approach. Don Irvin, RES, covered the income approach. This program of instruction seemed to be well received by the club members in attendance.

On Friday the Candidates' Club presented Phil Day with a bouquet of flowers in recognition of the tremendous amount of work she has done for the club. In a thank you note to the club, Phil says "thanks to all Candidates' Club members. May your CAE's and RES's multiply and flourish!" The Candidates' Club wishes the best of luck to Phil in her new capacity.

Also at the meeting, Stephen Pate of Guilford County was appointed to the Candidates' Club steering committee. Stephen will be replacing Porter Stokes.

BEAMER IS THE STATE'S NEWEST CAE

Richard Beamer, chief appraiser for Randolph County, recently received the IAAO designation of Certified Assessment Evaluator (CAE). Beamer, who was among the first state assessment administrators to become active in the Candidates' Club, completed his requirements earlier this year. He became a candidate in the IAAO Professional Designation Program on March 4, 1985.

Richard has been with Randolph County for six years. He has been a regular member of IAAO since 1984 and has successfully completed IAAO courses 1, 2, 201, 301, 302, 305, 4, and the Fundamentals of Assessment-Ratio Studies Workshop. Other career-oriented courses to his credit include Fundamentals of Property Tax Collection, Fundamentals of Listing and Assessing, and Fundamentals of Listing and Assessing Business Personal Property. Richard is a Certified Real Property Appraiser recognized by the North Carolina Department of Revenue and the North Carolina Association of Assessing Officers. He is a 1976 graduate of Asheboro High School and a 1980 graduate of the Cleveland Institute of Electronics.

MAYES RECEIVES McCARREN AWARD

Jack Mayes, supervisor of Business Personal Property Assessments for Mecklenburg County, was recently presented with the McCarren Award from the IAAO. The award is given to IAAO representatives who have made the greatest contributions toward achieving the membership goals of the association. This is the second consecutive year that Jack has received this prestigious award.

If you have any questions about IAAO membership, certification, and education, contact Jack at (704) 336-3325.

KNOW YOUR CANDIDATES' CLUB STEERING COMMITTEE

Steering Committee, 1987-1988

Richard Beamer, CAE
145 Worth Street
Asheboro, NC 27203

J. D. Brickhouse
P.O. Box 449
Columbia, NC 27925

Margaret Claxton
Route 1, Box 113-B
Whittier, NC 28789

Debbie Z. King, RES
6245 Gold Wagon Lane
Charlotte, NC 27212

Stephen Pate
2001 Independence Drive
Greensboro, NC 27408

William H. Tester
Room 115, County Courthouse
Boone, NC 28607

MY FIRST IAAO CONFERENCE
By Margaret B. Claxton.

Needing a vacation and looking for a tax deduction, my husband and I decided to attend the 1987 IAAO Conference in New Orleans. I had heard a lot of positive things (mostly fun-oriented) about New Orleans but had never been there. Several tax people had told me IAAO Conferences were interesting as well as fun, so I checked our finances to see if we could afford to go. Not being a supervisor, I could not justify asking our county to finance my trip.

We got into New Orleans on Saturday, September 12, around noon. We missed seeing the Pope but saw plenty of other people. We checked into our hotel, freshened up, and then I went to the registration desk where I received the registration materials and my first Joe Hunt campaign button. I saw few faces or names that I recognized, but there were lots of people who appeared to be renewing old friendships.

Saturday evening Mark and I went out to dine at a very nice restaurant and then decided to go visit the French Quarter and Bourbon Street. It seemed several others had the same idea. Since the Pope and several other conferences were in town (we heard there were no vacancies within seventy-five miles of the city), there was an overabundance of people in the streets and things were really lively on Saturday night. I had heard about Bourbon Street and the things you could see and do in the French Quarter, but, I did not realize that they would be so openly displayed. It was a unique experience to say the least. We stopped by Pat O'Brien's as well as several other liquid refreshment establishments and, believe it or not, we even spotted some other North Carolina conferees in that mob. I had never seen so many bars in such a small area. We don't have bars (well, not many) in the mountains of western North Carolina.

Sunday was for leisure or a Plantation Tour, and we opted for leisure. We had a nice leisurely brunch before returning to the French Quarter and Bourbon Street to do some shopping for the kids. The place looked a little different in the sunlight. Sunday evening we attended the new member orientation. We saw a few people we knew from North Carolina and met some new people. The orientation was held on the forty-first floor of the Marriott and gave a magnificent view of the Mississippi River as well as other sections of the city. From there we went down to the Grand Ballroom and the opening reception. There we encountered the different IAAO VIPs and lots of great Cajun and Creole food. We then went up to the North Carolina hospitality suite and got to see some familiar home state folks. One hitch to entering

the hospitality suite was the requirement to wear a Joe Hunt Campaign button before you could be served anything to eat or drink (only kidding).

On Monday morning, bright and early, the North Carolina delegation held a welcoming and kickoff campaign breakfast for Joe Hunt's bid for the IAAO vice-presidency in 1988. It was nice, some IAAO dignataries came to meet us, and the NCAAO graciously picked up the tab. The opening session began at 10:00 A.M. and the governor of Louisiana was even there to welcome us. Lunch was on your own and then workshops started at 1:00 P.M. There were concurrent workshops and round table discussions going on throughout the conference, so that you could pick and choose the programs that interested you. I attended some interesting ones as well as some boring ones. To avoid offending anyone, I will not say which was which. The first session I went to was entitled "Exhibitors Presentation: Mass Appraisal and Data Base Systems," where I saw my first hand-held computers that do appraisals in the field. The late afternoon workshop I attended was entitled "Commercial and Industrial Property Appraisal: Case Studies."

On Monday evening we attended the "Fais Do-Do," which was an enormous amount of fun. I did not know quite what to expect. Buses picked us up at the hotel and took us down by the river to some warehouses. Upon unloading, southern belles greeted us and a Cajun band played music. There was food and more food (boiled shrimp, fresh oysters, red beans and rice, jambalaya, crawfish pie, turtle soup, Mississippi mud pie, pecan pie, and plenty of beer and other fun fluids). After eating you could do the two-step or chicken scratch to the Cajun music along the river (reminiscent of scenes from The Big Easy) or go inside and listen to some easy jazz. After plenty of everything, especially southern hospitality, buses shuttled us back to the hotel. We then went back to the North Carolina hospitality suite, got some more Joe Hunt campaign buttons, met some new faces from other states, and reacquainted ourselves with some other North Carolinians.

On Tuesday morning, beginning at 8:30 A.M., there were more round table discussions and concurrent workshops. I attended the discussion on "Developments in the IAAO Professional Designation Program" that dealt with the different Candidates' Clubs and a structured outline of a demo. The next workshop was on the "Remote Data Collection/Entry Devices" that almost make manual cards obsolete. The awards luncheon began at noon. Not only was North Carolina up for three different awards, we received two of them. Jack Mayes won a McCarren Award for his contributions toward achieving membership goals, and Guilford County won a Public Information Award for getting information to taxpayers concerning the assessment process. Then we listened to Bob Brunner give an entertaining talk and watched a hilarious film of television news bloopers. We also witnessed President Mike Austin lose his composure as well as his written remarks.

Wednesday morning started with a continental breakfast, at which time the annual business meeting was held. During this meeting, presentations of designations and other recognitions were given to various members. Workshops lasted the remainder of the day. The two I attended were "Blowing Your Own Horn: The Need For a Progressive Public Information Effort" and "Appraisal of Residential Property," in which our own Pete Rodda spoke. Wednesday evening

featured the Gala Banquet, where everyone decked themselves in their finest array. It was complete with delicious food for most of us, long-winded speeches, a mardi gras parade, and dancing. On Thursday most of the North Carolina delegation headed home on early morning flights.

Although there were spouse events going on throughout the conference, Mark preferred to find his own entertainment. We both enjoyed New Orleans and the friendships that were made and deepened while we were there. Much is said about the social aspects of a conference--many times you learn more from talking with your peers than from listening to the experts. I hope to attend the Nashville Conference in 1988 and watch as Joe Hunt is installed as vice-president of IAAO. I am also looking forward to meeting new people and renewing some acquaintances. The North Carolina delegation should be bigger and better than ever before! There is talk of chartering buses that will leave from the coast and pick up delegates as it crosses the state on the way to Nashville. Make plans to attend. Not only do you get to have a nice time, but you also learn from the workshops and discussions, share valuable experiences with others in your field, and are recognized as being a professional who cares enough about your career to keep abreast of new trends and technological advances. I feel fortunate to have been able to attend and believe that my employer as well as myself benefited from the experience.

**CANDIDATES' CLUB
1987 MEMBERSHIP ROSTER**

<u>NAME</u>	<u>COUNTY/COMPANY</u>
Todd Alston	Durham
Juanita Barton	Transylvania
Richard A. Beamer, CAE	Randolph
Randy Beeman	Pamlico
James Bethune	New Hanover
Francis Bloome	Cumberland
Albert Boone	Nash
J. D. Brickhouse	Tyrrell
James W. Brown	Durham
Gary Bryson	Transylvania
Cameron Cashwell	Durham
Margaret Claxton	Jackson
Cecil Dills	Jackson
William Doolittle	Rutherford
Patsy Elliott	Brunswick
Martin Eudy	Gaston
Doyle Freeman	Henderson
Sterling Hancock	Cartaret
Ed Helms	CLT
Jim Hendrick	Cleveland
Debra Hill	Randolph
Jerry Holland	Rockingham
Don Irvin, RES	Mecklenburg
Kevin Jones	Cumberland
Brenda King	Cleveland

Debbe King, RES
 Richard Lightner
 Barbara McCrary
 Robert Moran
 Ken Murray
 Daryl Parker
 Stephen Pate
 Johnny Patterson
 James A. Peay
 R. J. Phillips
 John Prather
 Mary Jean Presnell
 David Reid
 Rose Robinson
 Pete Rodda
 Terry Rowland
 Wilton Rountree
 Jerry Smith
 Stephen Smith
 Porter Stokes
 Bill Stroupe
 Diana Talton
 William Tester
 Cissy Underdown
 Nancy Updergrave
 Wayne Vanderford
 Bobby Wicker
 Jack Williford
 Jake Wolfe
 Michael Worley

Mecklenburg
 Macon
 Transylvania
 Wake
 Nash
 Davie
 Guilford
 Cabarrus
 Cumberland
 Standard Computer Systems
 Davidson

Transylvania
 Onslow
 Cumberland
 Cabarrus
 Edgecombe
 Guilford
 Polk

Gaston
 Cartaret
 Watauga
 Beech Mountain
 Dare
 Jones
 Harnett
 Bertie
 Standard Computer Systems
 Mecklenburg

DON'T FORGET!
CANDIDATES' CLUB MEETING
INSTITUTE OF GOVERNMENT
FEBRUARY 22-23, 1988

The Candidates' Club will next meet at the Institute of Government in Chapel Hill on February 22-23, 1988. The meeting will begin at 1:00 P.M. on Monday and end at 12:00 P.M. on Tuesday. Greg Lafakis, CAE, chief report grader for IAAO, will be the guest speaker. Greg will discuss common mistakes made in demonstration appraisal reports.

This meeting promises to be very informative, and everyone is invited to attend.

Articles are needed for future issues of The Virtuoso. If you have an idea to share or a comment to make, please submit it to:

Richard Beamer, CAE
 Randolph County Tax Department
 145 Worth Street
 Asheboro, NC 27203

WHAT HAVING AN IAAO PROFESSIONAL DESIGNATION MEANS TO ME

I have found that having the CAE designation has given credibility to my capabilities as an appraiser, both in the eyes of the public as well as other professionals.

Ralph Neely, CAE, Mecklenburg County

Primarily it has gained me respect from others outside the mass appraisal field as to my expertise and know-how concerning my job. I feel it has given my opinions of value more credence in the eyes of our local Board of Equalization and Review as well as the State Property Tax Commission.

Debbie Z. King, RES, Mecklenburg County

Having a professional designation is a real confidence builder, not only to the designee's self-esteem, but also to those members of the public who must rely upon the professionalism of the appraiser. Much has been said and printed recently regarding that professionalism; having a designation conferred by an organization that is respected on an international level goes a long way in helping to remove the cloud that now hangs over the profession.

Don Irvin, RES, Mecklenburg County

I feel that obtaining a professional designation has improved my abilities as an appraiser. We should be constantly striving to gain the respect and confidence of the taxpayers. A professional designation is certainly a step in the right direction. Furthermore, receiving a designation can really boost your self-confidence. I no longer feel intimidated by fee appraisers or the appraisers representing utilities and large corporations.

Richard Beamer, CAE, Randolph County

The North Carolina Candidates' Club

CONSTITUTION OF THE NORTH CAROLINA CANDIDATES' CLUB

ARTICLE I

Name and Objectives

Section 1. The name of this organization shall be the North Carolina Candidates' Club.

Section 2. The objective of this club shall be to promote the International Association of Assessing Officers Professional Designation program in order to improve the standards of assessment procedure and practice throughout North Carolina.

ARTICLE II

Membership and Dues

Section 1. Regular Members. Governmental (State and Local) employees who are actively involved in Property Tax Assessment in North Carolina. Annual dues payable on or before the first annual meeting shall be \$10.00 per year.

Section 2. Subscribing Members. Persons not eligible as regular members who subscribe to the objectives of the club. Annual dues payable on or before the first annual meeting shall be \$20.00.

Section 3. Honorary Members. CAE's who have attained their designation through the North Carolina Candidates' Club or who have attained the CAE designation in the past who are residents of North Carolina.

Section 4. Voting Rights. Voting rights are reserved for regular members and subscribing members who are in good standing.

Section 5. Ethics. Every member of the club agrees to conduct himself or herself in a manner that shall reflect credit upon the profession of assessing; to protect that profession from any form of activity found to be unjust, unethical, or detrimental to the public or to the profession; and to give strict adherence to the Code of Ethics which has been adopted by the North Carolina Association of Assessing Officers and the International Assessing Officers.

Section 6. Dues. Members in good standing shall be those who have made timely payment of dues. Timely payment being dues paid on or before the first annual meeting.

ARTICLE III

Steering Committee

Section 1. Selection. At the first annual meeting, two (2) persons who are members in good standing, shall be elected for a three-year (3) term from the regular and subscribing members. Total membership shall be six (6).

Section 2. Moderator. The steering committee shall elect a moderator for the purpose of: a) calling steering committee meetings, b) conducting the business for the steering committee, c) reporting to the membership, d) presiding at regular club meetings.

Section 3. Secretary/Treasurer. The steering committee shall elect a secretary/treasurer to: a) serve as club secretary at all club meetings and steering committee meetings, b) to handle all correspondence for club, c) to handle all funds for club, d) to preside in absence of moderator at club meetings and steering committee meetings.

ARTICLE IV

Meetings

Section 1. Meetings. The club shall hold two (2) annual meetings at the Institute of Government in Chapel Hill. Meetings shall be devoted to discussion of matters of interest pertaining to achieving a professional designation through the International Association of Assessing Officers Professional Admissions Program.

ARTICLE V

Amendments

Section 1. Amendments. This constitution may be amended by a majority vote of regular and subscribing members in good standing, present and voting at the annual meetings.

ARTICLE VI

Fiscal Year

Section 1. Fiscal Year. The fiscal year of the club shall be from January 1 to December 31.