

**Appraisal Institute<sup>®</sup>**

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# **Associate Member Guidance**

## **Experience Screening**

# Experience Screening

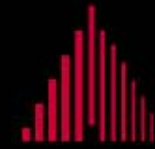


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- Designated membership requirement
- One of the best benefits for Associate members!

# Experience Criteria

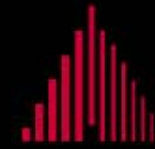


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- Requirements to receive credit
  - General Associate members
    - 4,500 hours of specialized experience credit
  - Residential Associate members
    - 3,000 hours of experience credit

# Experience Criteria

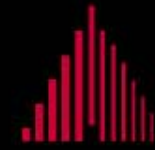


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- Significant work product responsibility
  - Sole signatory or report, or
  - Signing certification or named as having significant responsibility
- Description of what you did should be in the report (per USPAP 2-2 [a, b, c] vii)

# Experience Criteria

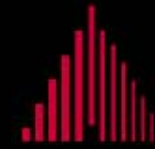


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- Alternatives to significant work product responsibility available if you:
  - Supervise others who produce work under the Standards
  - Train appraisers who meet the criteria
  - Have not produced sufficient work for Experience Credit over the past 10 years
- Contact Admissions for further details

# Experience Criteria

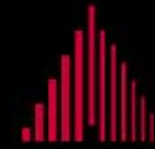


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- Reasonable relationship of hours
- Correlation between number of hours claimed and the amount/complexity of the work

# Experience Criteria

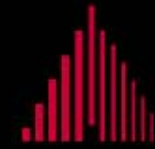


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- Must show an **understanding of theory and practice** exhibited by both:
  - the assignments you submit and
  - your Experience Screening interview

# Experience Criteria



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- Your experience must qualify
  - General Associate members:
    - Specialized experience
    - NOT 1-4 family properties
  - Residential Associate members:
    - Residential experience

# Qualifying Experience

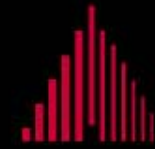


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- Valuation of Real Estate – Standards 1 & 2
- Review Appraisal – Standard 3
- Appraisal Consulting – Standards 4 & 5
- Mass Appraisal – Standard 6
- Other – experience gained by providing practical solutions to real property economic problems that are not covered by Standards 1-6

# Qualifying Residential Experience



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- Work relating to residential real estate or experience gained by providing practical solutions to residential real property economics problems
- May include apartments from 2 to hundreds of units, residential subdivisions, houses, condos, duplexes, and other residentially related property

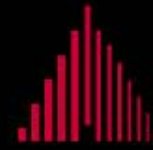


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# Variety of Work

- Variety of work is mandatory for general Associate members
- Residential work must include more than one type of residential real estate



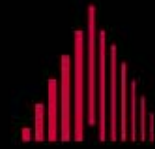
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# Advisory Guidance

- Counseling session intended to provide constructive feedback on work
- Optional
- Educational only, not pass/fail
- Screener – assigned by national office
- No fee (FREE)
- Highly recommended
- **Benefit of your Associate membership!**

# Advisory Guidance



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- General Associate member chooses 2 reports
- Residential Associate member chooses 5 reports
- No set timeframe for report choice, except must be prior to submission for Experience Credit



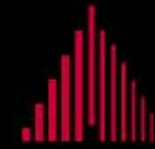
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# Advisory Guidance

- Reports may be current
- Associate member may choose to have more than one Advisory Guidance interview
- May choose properties with issues
- No List of Assignments required
- Reports cannot be chosen again for experience credit interview

# Screeners and Experience Credit

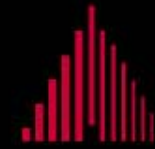


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- You send application and List of Assignments to national
- Screener assigned for phone interview
- Screener results options:
  - Award full credit
  - Request you improve work and return for second interview at a later date
  - Award partial credit
  - Award zero credit

# Screeners and Experience Credit



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- Award full credit –work easily meets the criteria
- Request improvements –Associate can make changes in new work to meet the criteria
- Award partial credit – some criteria met
- Award zero credit – very little criteria met

# Associate Member Options

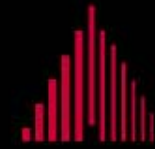


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- Associate member can request a Second Screener
- Must submit a nominal fee and a letter explaining why you disagree with the award of the First Screener

# Second Screener



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- A Second Screener may:
  - Look at the same work
  - Choose to look at newer work
  - Request improvements –Associate member can make changes in new work to meet the criteria
  - Award no less than the First Screener

# Associate Member Options

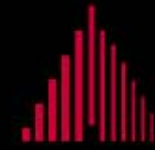


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- Associate Choices after Second Screener Award: Experience Committee
- Must submit a fee and a letter explaining why you disagree with the award of the Second Screener

# Experience Committee

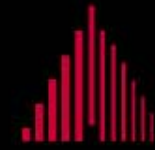


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- 3-5 Members
- Considers the same work as the Screener
- Interviews you in person

# Experience Committee



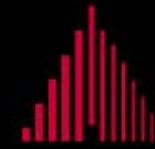
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## They may:

- Approve full credit
- Approve partial credit
- Award no less than the Second Screener

# Advice for Associate Members

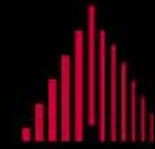


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- Select the **best** of your **typical** reports
- Work should be straight-forward
- Do not pick the complex and unusual reports

# Advice for Associate Members

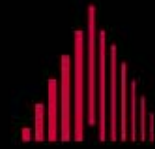


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- Submit electronically
- Submit work in it's entirety (as it went to the client)
- Have report and file available for your reference during the interview (hard copies usually work best)

# Interview Advice for Associate Members



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- Be professional and courteous
- Screener will ask questions to determine extent of your knowledge and possibly clarify details from the report – **be familiar with the work so you can answer the questions**
- **Ask questions of your screener** – the screening should be educational for you, too!

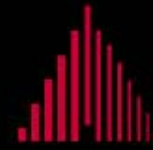


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# Screeners Criteria

- ✓ Do you have significant responsibility for the work?
- ✓ Does the work meet the Standards?
- ✓ Do you have an understanding and are you using the appropriate techniques for the property type?
- ✓ Are the hours reasonable



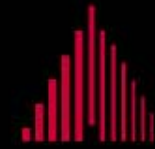
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# Screeners Criteria

- They are not grading your reports, they are assessing your experience
- Your experience is both your work and your understanding

# Associate Member Resources

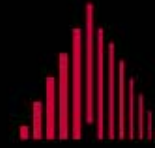


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- “Experience Screening Guidance – Tips for Associate Members”
- “Common Errors and Issues”
- “A Word about Appraisal Institute Standards, Certifications, Compliance Statements, and Appraisal Institute Certification Statements”

# Designation Requirement Tools Page

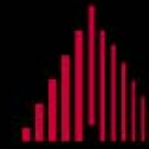


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- Go to [www.appraisalinstitute.org](http://www.appraisalinstitute.org)
- Click on the Membership tab
- Select the link for “Designation Requirement Tools” on the left
- Find all the forms, guides, resources for Designated membership

# Additional Questions



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