

PUBLIC MEETING OF THE NEBRASKA REAL PROPERTY APPRAISER BOARD
Thursday, September 16, 2021, 9:00 a.m.
Nebraska Real Property Appraiser Board Office, First Floor, Nebraska State Office Building
301 Centennial Mall South, Lincoln, Nebraska

AGENDA

A. Opening 9:00 a.m.

B. Notice of Meeting (Adopt Agenda)

The Nebraska Real Property Appraiser Board will meet in executive session for the purpose of reviewing applicants for credentialing; applicants for appraisal management company registration; investigations; pending litigation, or litigation that is imminent as evidenced by communication of a claim or threat of litigation; and employee performance evaluation. The Board will exit executive session at 9:15 a.m. If needed, the Board will re-enter executive session at the conclusion of the public agenda items discussion to complete review of the above-mentioned items. The Board will not take action on agenda items C, D, E, and F until executive session is completed.

C. Credentialing as a Nebraska Real Property Appraiser1-6

1. New Applicants for Certified General Credential through Reciprocity
 - a. CG21012R

D. Registration as an Appraisal Management Company

E. Consideration of Compliance Matters1

1. Active Investigations
 - a. 21-04
 - b. 21-05
2. Post-Board Action Matters
 - a. 20-11

F. Consideration of Other Executive Session Items1-2

1. 2021.09
2. Personnel Matters

G. Welcome and Chair's Remarks (Public Agenda 9:15 am)

H. Board Meeting Minutes

1. Approval of August 19, 2021 Meeting Minutes 1-10

I. Director's Report

1. Real Property Appraiser and AMC Counts and Trends
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 - d. Appraisal Management Company Report7
2. Director Approval of Applicants
 - a. Real Property Appraiser Report 8
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J. Financial Report and Considerations

1. August Financial Report
 - a. Budget Status Report 1-3
 - b. MTD General Ledger Detail Report 4-10
 - c. Financial Charts 11-13
2. Per Diems
3. Meeting Owl Pro 14-21

K. General Public Comments

L. Consideration of Education/Instructor Requests

M. Unfinished Business

1. Real Property Appraiser National Uniform Licensing and Certification Exam Testing Service Inquiry

N. New Business

1. Open 2nd Congressional District Certified Real Property Appraiser Representative Position 1-2

O. Legislative Report and Business

1. Nebraska Real Property Appraiser Act Update
2. Other Legislative Matters

P. Administrative Business

1. Guidance Documents
2. Internal Procedural Documents
3. Forms, Applications, and Procedures

Q. Other Business

1. Board Meetings
2. Conferences/Education
3. Memos from the Board
4. Quarterly Newsletter
 - a. Summer 2021 Edition of The Nebraska Appraiser 1-11
5. Appraisal Subcommittee
 - a. ASC Meeting: November 17, 2021 12
6. The Appraisal Foundation
 - a. TAF September Newsletter 13-14
 - b. Appraiser Qualifications Board
 - i. AQB Public Meeting: November 19, 2021 – Virtual
 - ii. AQB Adopts Changes to Real Property Appraiser Qualification Criteria 15-16
 - c. Appraisal Standards Board
 - i. First Exposure Draft of proposed changes to the 2023 edition of USPAP 17-66
7. Association of Appraiser Regulatory Officials
8. In the News

R. Adjourn

**NEBRASKA REAL PROPERTY APPRAISER BOARD
NRPAB OFFICE MEETING ROOM, FIRST FLOOR
NEBRASKA STATE OFFICE BUILDING
301 CENTENNIAL MALL SOUTH, LINCOLN, NE**

August 19, 2021 Meeting Minutes

A. OPENING

Chairperson Christopher Mustoe called to order the August 19, 2021 meeting of the Nebraska Real Property Appraiser Board at 9:00 a.m., in the Nebraska Real Property Appraiser Board meeting room located on the first floor of the Nebraska State Office Building, 301 Centennial Mall South, Lincoln, Nebraska.

B. NOTICE OF MEETING

Chairperson Mustoe announced the notice of the meeting was duly given, posted, published, and tendered in compliance with the Open Meetings Act, and all board members received notice simultaneously by email. Publication of official notice of the meeting appeared on the State of Nebraska Public Calendar found at www.nebraska.gov on August 10, 2021. The agenda was kept current in the Nebraska Real Property Appraiser Board office and on the Board's website. In accordance with the Open Meetings Act, at least one copy of all reproducible written material for this meeting, either in paper or electronic form, was available for examination and copying by members of the public. The material in paper form was available on the table in a public folder, and the material in electronic form was available on the Board's website in Public Meeting Material (https://appraiser.ne.gov/board_meetings/). A copy of the Open Meetings Act was available for the duration of the meeting. For the record, Board Members Christopher Mustoe of Omaha, Nebraska, Thomas Luhrs of Imperial, Nebraska, Wade Walkenhorst of Lincoln, Nebraska, Bonnie Downing of Dunning, Nebraska, and Cody Gerdes of Lincoln, Nebraska were present. Also present were Director Tyler Kohtz, Business and Licensing Program Manager Allison Nespor, and Business and Education Program Manager Katja Duerig, who are all headquartered in Lincoln, Nebraska.

ADOPTION OF THE AGENDA

Chairperson Mustoe reminded those present for the meeting that the agenda cannot be altered 24 hours prior to the meeting except for emergency items according to the Open Meetings Act. Board Member Luhrs moved to adopt the agenda as printed. Board Member Walkenhorst seconded the motion. With no further discussion, the motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

Board Member Luhrs moved that the Board go into executive session for the purpose of reviewing applicants for credentialing; applicants for appraisal management company registration; investigations; pending litigation, or litigation which is imminent as evidenced by communication of a claim or threat of litigation; and employee performance evaluation. A closed session is clearly necessary to prevent needless injury to the reputation of those involved. Board Member Downing seconded the motion. The time on the meeting clock was 9:03 a.m. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

Board Member Luhrs moved to come out of executive session at 9:57 a.m. Board Member Downing seconded the motion. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

Break from 9:57 a.m. to 10:00 a.m.

G. WELCOME AND CHAIR'S REMARKS

Chairperson Mustoe welcomed all, and said he hopes everyone's summer is wrapping up nicely and all are healthy. The Chairperson shared his hope for a pleasant fall. Roger Morrissey was the only member of the public present.

H. BOARD MEETING MINUTES

1. APPROVAL OF JULY 15, 2021 MEETING MINUTES

Chairperson Mustoe asked for any additions or corrections to the July 15, 2021 meeting minutes. With no discussion, Chairperson Mustoe called for a motion. Board Member Luhrs moved to adopt the July 15, 2021 meeting minutes as presented. Board Member Downing seconded the motion. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

I. DIRECTOR'S REPORT

1. REAL PROPERTY APPRAISER AND AMC COUNTS AND TRENDS

a. Real Property Appraiser Report

Director Kohtz presented seven charts outlining the number of appraisers as of August 19, 2021 to the Board for review. The Director reported that he had no specific comments and asked for questions or comments. There was no discussion.

b. Temporary Real Property Appraiser Report

Director Kohtz presented three charts outlining the number of temporary credentials issued as of July 31, 2021 to the Board for review. The Director asked for any questions or comments. There was no further discussion.

c. Supervisory Real Property Appraiser Report

Director Kohtz presented two charts outlining the number of supervisory appraisers as of August 19, 2021 to the Board for review. The Director reported that he had no comments, and asked for any questions or comments. There was no discussion.

d. AMC Report

Director Kohtz presented two charts outlining the number of AMCs as of August 19, 2021 to the Board for review. The Director reported that he had no comments, and asked for any questions or comments. There was no discussion.

2. DIRECTOR APPROVAL OF APPLICANTS

a. Real Property Appraiser Report

Director Kohtz presented the Real Property Appraiser Report to the Board for review showing real property appraiser applicants approved for credentialing by the Director, and the real property appraiser applicants approved to sit for exam by the Director, for the period between July 1, 2021 and August 10, 2021. The Director asked for any questions or comments. There was no further discussion.

b. Appraisal Management Company Report

Director Kohtz presented the Appraisal Management Company Report showing appraisal management companies approved for registration by the Director for the period between July 1, 2021 and August 10, 2021 to the Board for review. The Director asked for any questions or comments. There was no further discussion.

c. Education Activities and Instructors Report

Director Kohtz presented the Education Activities and Instructors Report showing education activities and instructors approved by the Director for the period between July 1, 2021 and August 10, 2021 to the Board for review. The Director asked for any questions or comments. There was no further discussion.

3. 2021-22 NRPAB GOALS AND OBJECTIVES + SWOT ANALYSIS

Director Kohtz presented the 2021-22 NRPAB Goals and Objectives and SWOT Analysis to the Board for review and provided a status update. The Director guided the Board to Laws, Rules, and Guidance Documents, and reported that the first draft of the Real Property Appraiser Act update has been completed. Director Kohtz then moved to Credentialing and Registration, and informed the Board that a second attempt to contact Pearson Vue was made on August 9, 2021, but no response has been received. Another Credentialing and Registration goal, limit the disciplinary action reporting requirement to a set number of years based on reasonableness on the applications for credentialing, was completed on July 15, 2021. Finally, Director Kohtz informed the Board that no response has been received from OCIO regarding the requests for a cost estimate for the Develop API Translator between NRPAB Database and ASC Federal Registries and the AMC Renewal Online Application and Interface projects. Chairperson Mustoe asked whether the OCIO is communicating with the agency at all. Director Kohtz responded that the OCIO has been working on numerous small tickets, but that it does not seem interested in taking on these larger projects right now. Chairperson Mustoe thanked the Director. Director Kohtz asked for any questions or comments. With no further discussion, Chairperson Mustoe invited the Director to proceed to Financial Report and Considerations.

J. FINANCIAL REPORT AND CONSIDERATIONS – AUGUST 2021

1. APPROVAL OF JULY RECEIPTS AND EXPENDITURES

The receipts and expenditures for July were presented to the Board for review in the Budget Status Report. Director Kohtz brought attention to the Employee Assistance Pro expense, and informed the Board that the \$37.08 expenditure is a Department of Administrative Services assessment for counseling services for employment issues, family issues, chemical dependency issues, or any other issue causing employees problems. The Director moved on to the \$1,037.00 expense for Accounting and Auditing Services. Director Kohtz indicated that this expenditure is another DAS assessment, this one for accounting and pre-auditing services provided to the Board by DAS. The Director then reported that the \$1,014.40 expenditure for Office Supplies Expense is primarily attributed to an update to the agency's appraisal publications library. A discussion took place regarding which publications were purchased and how recently the current editions of some of the publications became available. Director Kohtz noted that expenditures for the month of July totaled \$26,917.78, which amounts to 6.64 percent of the budgeted expenditures for the fiscal year; 8.49 percent of the fiscal year has passed.

The Director turned the Board's attention to revenues, and declared that \$5,225.00 in revenues were received for Certified General Renewal fees during the month. Director Kohtz remarked that the early availability of the online renewal application has already helped spread out real property appraiser renewal application submissions, which has had a positive effect on staff resources and revenues. Revenues reported for July were \$29,049.72, and total revenues amount to 7.09 percent of the projected revenues for the fiscal year. The Director asked for any questions or comments. There was no further discussion.

Director Kohtz then brought attention to the General Ledger for July. The Director reported that he had no specific comments, and asked for any questions or comments. BLPM Nespor noted that the NRPAB RENEW EFW DEPOSIT entries indicate a deposit of funds received via electronic funds withdrawal for the online renewal application. Director Kohtz thanked BLPM Nespor. There was no further discussion.

Director Kohtz presented three graphs showing expenses, revenues, and cash balance. The Director once again announced the expenditures and revenues for the month of July for the Real Property Appraiser Program, which includes both the Appraiser Fund and the AMC Fund. The Director then remarked that the cash balance for the AMC Fund is \$320,180.43, the Appraiser Fund is \$374,402.35, and the overall cash balance for both funds is \$694,582.78. Director Kohtz announced that the Board currently has a healthy cash balance, then asked for any questions related to the graphs. There was no further discussion.

Board Member Downing moved to accept and file the July 2021 financial reports for audit. Board Member Walkenhorst seconded the motion. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

2. PER DIEMS

Director Kohtz informed the Board that he had no per diem requests for this meeting and asked if any board members had a request for the Board to consider. There was no further discussion.

K. GENERAL PUBLIC COMMENTS

Chairperson Mustoe asked for any public comments. Roger Morrissey appeared before the Board. Mr. Morrissey inquired why an education provider would offer a course for three and one-half, or six and one-half hours, rather than a round number, such as three or six. Director Kohtz informed Mr. Morrissey that the number of hours approved for education activities depends on the amount of the course content that is applicable to real property appraisal practice. The Director continued by saying that an education provider might submit the activity for that specific amount, or the activity may be approved for an amount of time that is different from what is submitted based on what qualifies as real property appraiser education time.

Mr. Morrissey brought attention to the fact that the 2021 Commercial Real Estate Summit is only approved by the Board for six and one-half hours of continuing education. BEPM Duerig remarked that, in this case, the application for this activity requested six and one-half hours, and the actual instruction time was also found to be six and one-half hours during review of the activity. Mr. Morrissey indicated that it is strange that this would occur when it is commonly known that appraisers need twenty-eight hours of continuing education every CE period; the half hours don't mean much. Chairperson Mustoe commented that there is no penalty for completing more than twenty-eight hours in a continuing education period. The Chairperson agreed that the Commercial Real Estate Summit is always a beneficial event for appraisers, and informed Mr. Morrissey that the Commercial Real Estate Summit organizers would be better able to answer his question. Mr. Morrissey thanked the Board for their time. There was no further discussion.

L. CONSIDERATION OF EDUCATION/INSTRUCTOR REQUESTS: No discussion.

M. UNFINISHED BUSINESS

1. REAL PROPERTY APPRAISER NATIONAL UNIFORM LICENSING AND CERTIFICATION EXAM TESTING SERVICE INQUIRY

Director Kohtz reported that he had made a second attempt at contacting Pearson Vue on August 9, 2021, but has received no response to date. The Director then asked BLPN Nespor for an update on the current testing service. BLPN Nespor responded that two real property appraiser applicants took residential certification exams with no problems, but issues are still being reported for those wishing to take the general certification exam. The Director thanked BLPN Nespor, and asked for any questions or comments. There was no further discussion.

2. SUPERVISORY REAL PROPERTY APPRAISER AND TRAINEE COURSE

Director Kohtz reported that an online supervisory real property appraiser and trainee course has been approved and is currently available to Nebraska residents. BLPN Nespor indicated that at least two certificates of completion have been submitted for the course. The Director asked for any questions or comments. There was no further discussion.

N. NEW BUSINESS

1. RENEWAL SEASON TEMPORARY EMPLOYEES

Director Kohtz reported that the process of hiring two part-time interns to assist with credential renewals has begun. The Director noted that the anticipated start date for the positions is September 27, and the employees are usually on staff until mid-January. The Director asked for any questions or comments. There was no further discussion.

O. LEGISLATIVE REPORT AND BUSINESS

1. NEBRASKA REAL PROPERTY APPRAISER ACT UPDATE

Director Kohtz presented the August 2, 2021 draft of the Nebraska Real Property Appraiser Act with changes to the Board for consideration. The Director summarized the draft and brought attention to the following changes:

- Neb. Rev. Stat. § 76-2213.03 is added to include a definition for PAREA.
- The definition of “two-year continuing education period” is changed in N.R.S. § 76-2218 to accommodate those Nebraska real property appraisers who obtained their credential through reciprocity and who held a credential in another jurisdiction at the beginning of the year in which they were awarded a credential by the Board. This allows for the use of continuing education obtained in another jurisdiction prior to credentialing in Nebraska to be used as continuing education in Nebraska. If the individual was not credentialed in another jurisdiction at the beginning of the year in which they were awarded a credential by the Board, then the two-year continuing education period is the same as those awarded a credential through education, experience, and examination.
- The language in N.R.S. § 76-2221(4), “...except that a real property appraiser or a person licensed under the Nebraska Real Estate License Act is not exempt under this subdivision” is stricken, and the phrase, “...for the purpose of real estate taxation” is added. This change exempts any person from the Real Property Appraiser Act for the purpose of rendering an estimate or opinion of value as an owner of real estate.
- When referring to issuance of real property appraiser credentials, issuance of AMC registrations, and approval of education activities and instructors, “Real Property Appraiser Board” or “board” is stricken before “approval” throughout. This change is made for the purpose of transparency to not mislead the public as to who makes such approvals. The approval procedures are specified in Title 298, and indicate when such approval is made by the Director and when such approval is made by the Board. Director Kohtz indicated that these changes may be removed from the draft after discussion with the Banking, Commerce, and Insurance Committee legal counsel as the change may be seen as unnecessary.
- Language is added to N.R.S. §§ 76-2230, 76-2231.01, and 76-2232 to allow the successful completion of a PAREA program as prescribed by rules and regulation of the Board to be accepted as an alternative to the experience hour requirements as defined in the Real Property Appraiser Qualifications Criteria.
- An error regarding the number of semester hours required in the college-level examination program for the certified residential classification is corrected in N.R.S. § 76-2231.01. The Real Property Appraiser Qualifications Criteria require that six hours each be completed for college composition and for college mathematics, not three hours each.

- “Completion date” is stricken from the requirements for an applicant to qualify for issuance of a temporary credential in N.R.S. § 76-2233.01. Director Kohtz reminded the Board that this was discussed during the strategic planning meeting.

Director Kohtz asked for any questions or comments. The board members expressed support for the changes in the draft. Director Kohtz indicated that the next step is working with Bill Marienau, Legal Counsel for the Banking, Commerce, and Insurance Committee, to put together a requisition draft in a bill format. Board Member Luhrs moved to approve the Nebraska Real Property Appraiser Act update draft as presented, and authorize Director Kohtz to work with the Committee legal counsel to prepare a requisition draft. Board Member Walkenhorst seconded the motion. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

2. OTHER LEGISLATIVE MATTERS

Director Kohtz asked the Board if it had any other legislative matters that it wished to discuss. There was no further discussion.

P. ADMINISTRATIVE BUSINESS

1. GUIDANCE DOCUMENTS: No discussion.

2. INTERNAL PROCEDURAL DOCUMENTS: No discussion.

3. FORMS, APPLICATIONS, AND PROCEDURES

Director Kohtz presented the following new forms to the Board for consideration:

- a. **Subject Matter Expert Services Contractor USPAP Compliance Review Report Check Sheet**
- b. **Applicant Appraisal Review Services Contractor USPAP Compliance Review Report Check Sheet**

Director Kohtz reported that these forms were developed to ensure that USPAP compliance review contractors meet the scope of work in the appraisal services agreement before submitting a USPAP Compliance Review Report to the Board. Board Member Luhrs moved to approve the Subject Matter Expert Services Contractor USPAP Compliance Review Report Check Sheet and the Applicant Appraisal Review Services Contractor USPAP Compliance Review Report Check Sheet as presented. Board Member Downing seconded the motion. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

Q. OTHER BUSINESS

1. BOARD MEETINGS: No discussion.

2. CONFERENCES/EDUCATION: No discussion.

3. MEMOS FROM THE BOARD: No discussion.

4. QUARTERLY NEWSLETTER: No discussion.

5. APPRAISAL SUBCOMMITTEE

a. Review of Appraisal Standards and Appraiser Criteria; Focus on Fairness, Equity, Objectivity and Diversity

Director Kohtz presented an Appraisal Subcommittee media release titled, “Review of Appraisal Standards and Appraiser Criteria; Focus on Fairness, Equity, Objectivity and Diversity” to the Board for review. The Director reported that he had no specific comments, and asked for any questions or comments. There was no discussion.

6. THE APPRAISAL FOUNDATION

a. TAF August Newsletter

Director Kohtz presented The Appraisal Foundation’s August newsletter to the Board for review. The Director asked for any questions or comments. There was no discussion.

b. First Exposure Draft of a Proposed General Interpretation of the Real Property Appraiser Qualification Criteria

Director Kohtz presented The Appraisal Foundation’s First Exposure Draft of a Proposed General Interpretation of the Real Property Appraiser Qualification Criteria to the Board for review. The Director remarked that some states are not approving an individual’s experience and education before allowing him or her to sit for the exam. Director Kohtz expressed uncertainty as to how this could happen as the Real Property Appraiser Qualifications Criteria is very clear that an applicant’s education and experience must be approved prior to sitting for exam, and the ASC enforces the criteria in this manner. The Director asked for any questions or comments. There was no further discussion.

c. TAF Final Results Diversity Survey

Director Kohtz introduced to the Board for review, a presentation titled, “The Appraisal Foundation Final Results Diversity Survey.” The Director reported that he had no comments, and asked for any questions or comments. There was no discussion.

7. ASSOCIATION OF APPRAISER REGULATORY OFFICIALS

a. AARO Quarterly Update – 8.1.2021

Director Kohtz presented the AARO Quarterly Update – 8.1.2021 to the Board for review. The Director informed the Board that he had no specific comments, and asked for any questions or comments. Board Member Gerdes inquired whether AARO had decided to make any changes to the upcoming, in-person conference in Washington, D.C. in light of the nationwide surge of COVID-19 cases. Director Kohtz reported that no call has been made yet. There was no further discussion.

8. IN THE NEWS: No discussion.

Break from 10:42 a.m. to 11:11 a.m.

Board Member Luhrs moved that the Board go into executive session for the purpose of investigations and employee performance evaluation. A closed session is clearly necessary to prevent needless injury to the reputation of those involved. Board Member Walkenhorst seconded the motion. The time on the meeting clock was 11:11 a.m. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

Board Member Walkenhorst moved to come out of executive session at 12:10 p.m. Board Member Luhrs seconded the motion. The motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

C. CREDENTIALING AS A NEBRASKA REAL PROPERTY APPRAISER

Board Member Luhrs moved to take the following actions for the applicants as listed:

- T21019 / Approve as Trainee Real Property Appraiser.**
- T21020 / Deny. Send advisory letter.**

Board Member Downing seconded the motion. Motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

D. REGISTRATION AS APPRAISAL MANAGEMENT COMPANY: No discussion.

E. CONSIDERATION OF COMPLIANCE MATTERS

Board Member Luhrs moved to take the following actions for compliance matters:

- 21-04 / Proceed with investigation for the alleged violation of Neb. Rev. Stat. §§ 76-2237 and 76-2238 (4)(12)(14).**
- 21-05 / Proceed with investigation for the alleged violation of Neb. Rev. Stat. §§ 76-2237 and 76-2238 (4)(12)(14).**
- 20-11 / Authorize Special Assistant Attorney General Blake to file formal charges for violation of Neb. Rev. Stat. §§ 76-2237 and 76-2238 (4)(5)(12)(14)(19), and authorize Director Kohtz to negotiate a consent agreement through SAAG Blake.**

Board Member Downing seconded the motion. Motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

F. CONSIDERATION OF OTHER EXECUTIVE SESSION ITEMS

1. 2021.09

The Board reviewed documentation received from the Nebraska Department of Education showing that an education provider may be advertising appraiser education activities to Nebraska resident real property appraisers without first obtaining approval by the Board. The Board agreed that notice of Nebraska law pertaining to advertisement of appraiser education activities should be provided to the education provider. Board Member Luhrs moved to send the education provider a letter to inform the organization of the requirements pertaining to advertising or offering appraiser education activities to Nebraska credential holders as found in the Real Property Appraiser Act and Title 298. Board Member Downing seconded the motion. Motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye.

2. PERSONNEL MATTERS

The Board discussed personnel matters. No action was taken by the Board.

R. ADJOURNMENT

Board Member Luhrs moved to adjourn the meeting. Board Member Walkenhorst seconded the motion. Motion carried with Luhrs, Walkenhorst, Downing, Gerdes, and Mustoe voting aye. At 12:13 p.m., Chairperson Mustoe adjourned the August 19, 2021 meeting of the Real Property Appraiser Board.

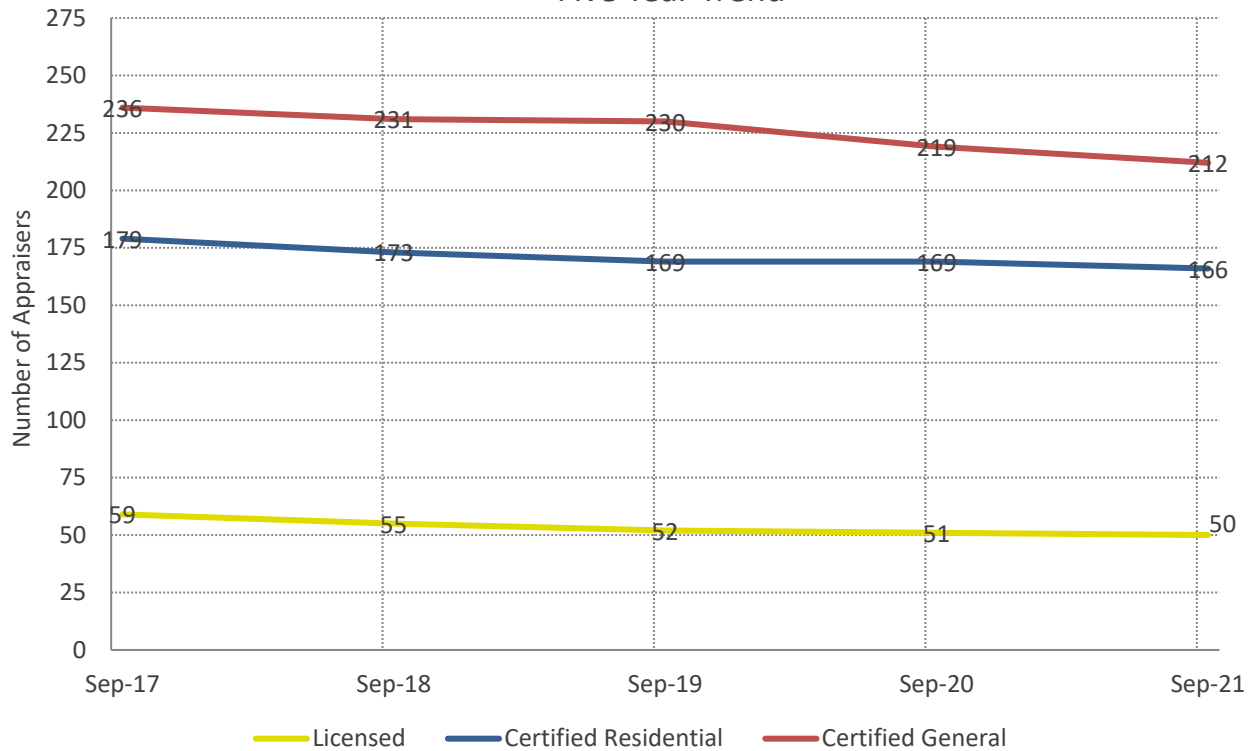
Respectfully submitted,

Tyler N. Kohtz
Director

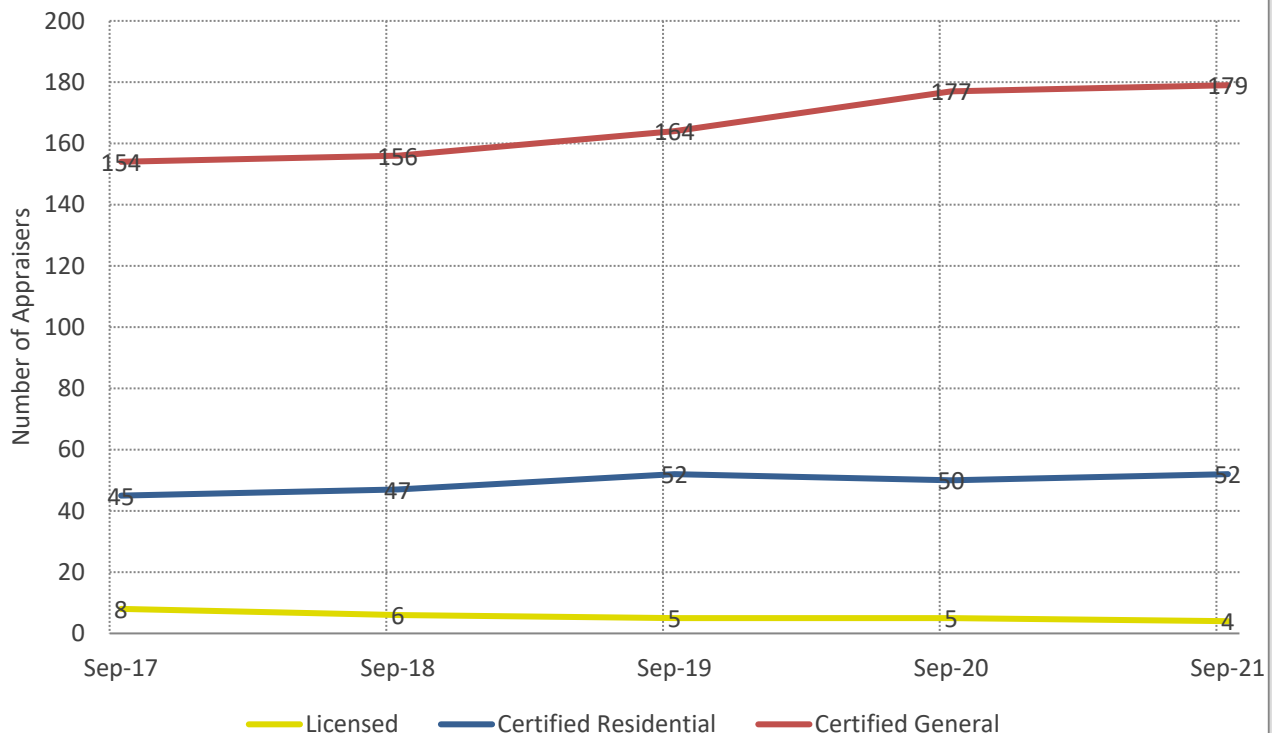
These minutes were available for public inspection on August 27, 2021, in compliance with Nebraska Revised Statute § 84-1413 (5).

Real Property Appraiser Report

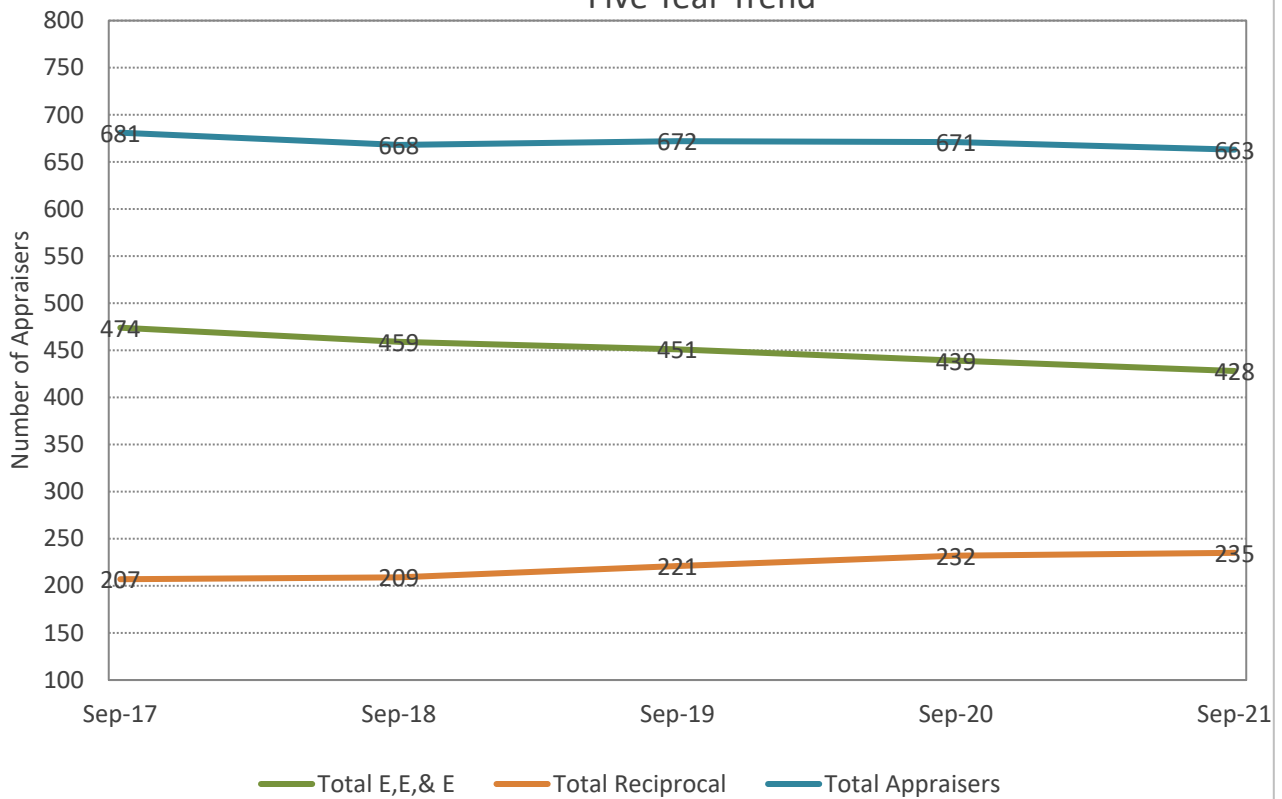
Real Property Appraisers Credentialed through
Education, Experience, and Examination (not including Trainee)
- Five Year Trend



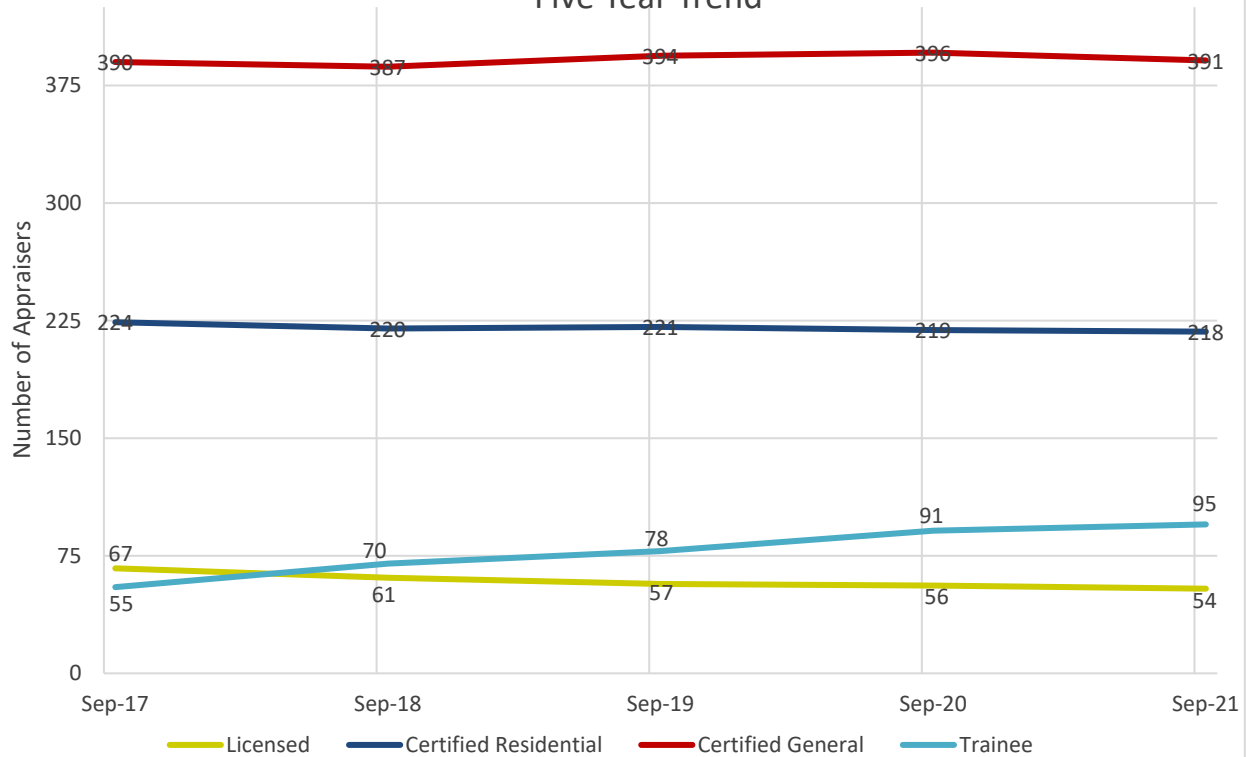
Real Property Appraisers by Classification
Credentialed through Reciprocity - Five Year Trend



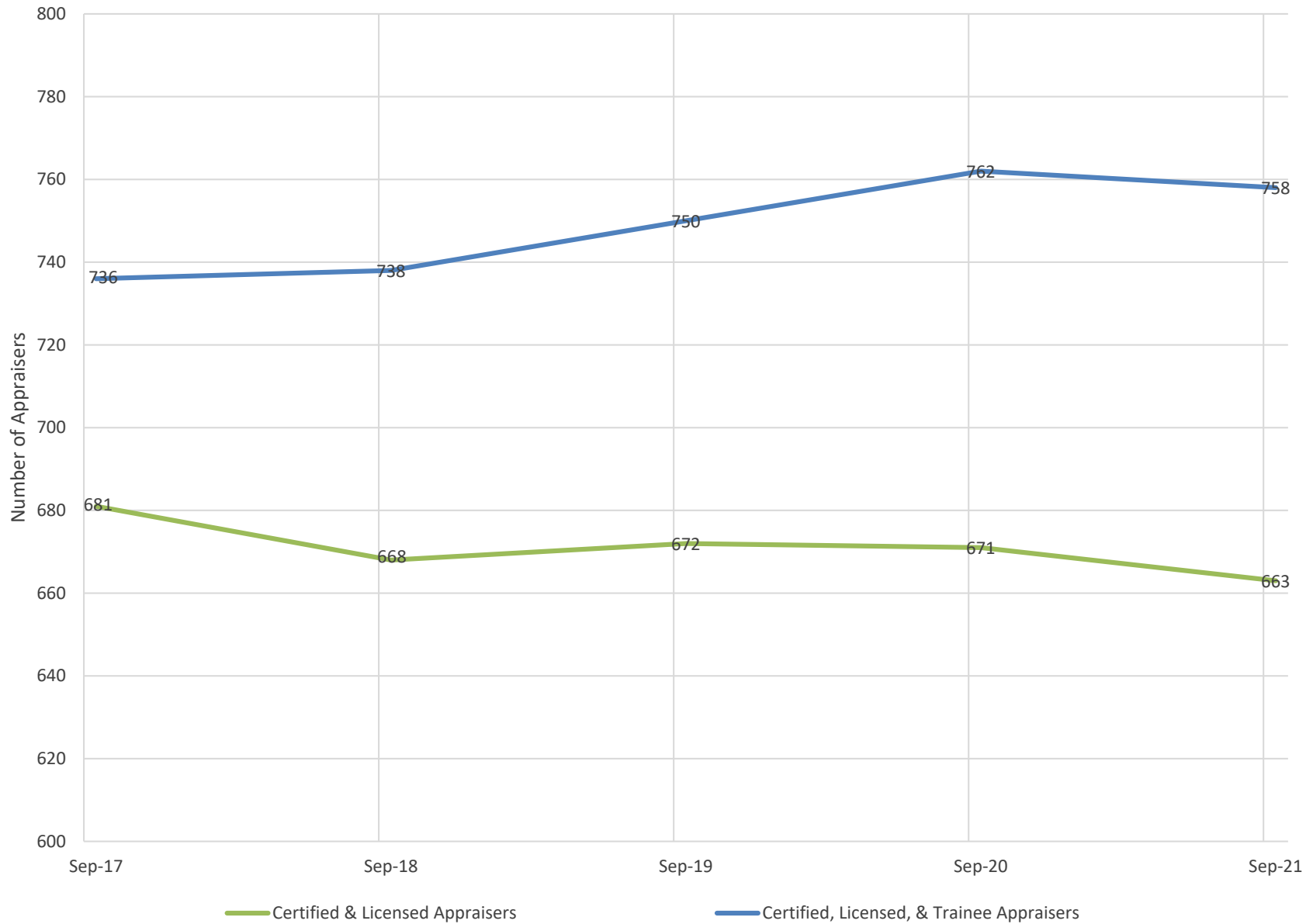
Total Real Property Appraisers (not including Trainee)
- Five Year Trend



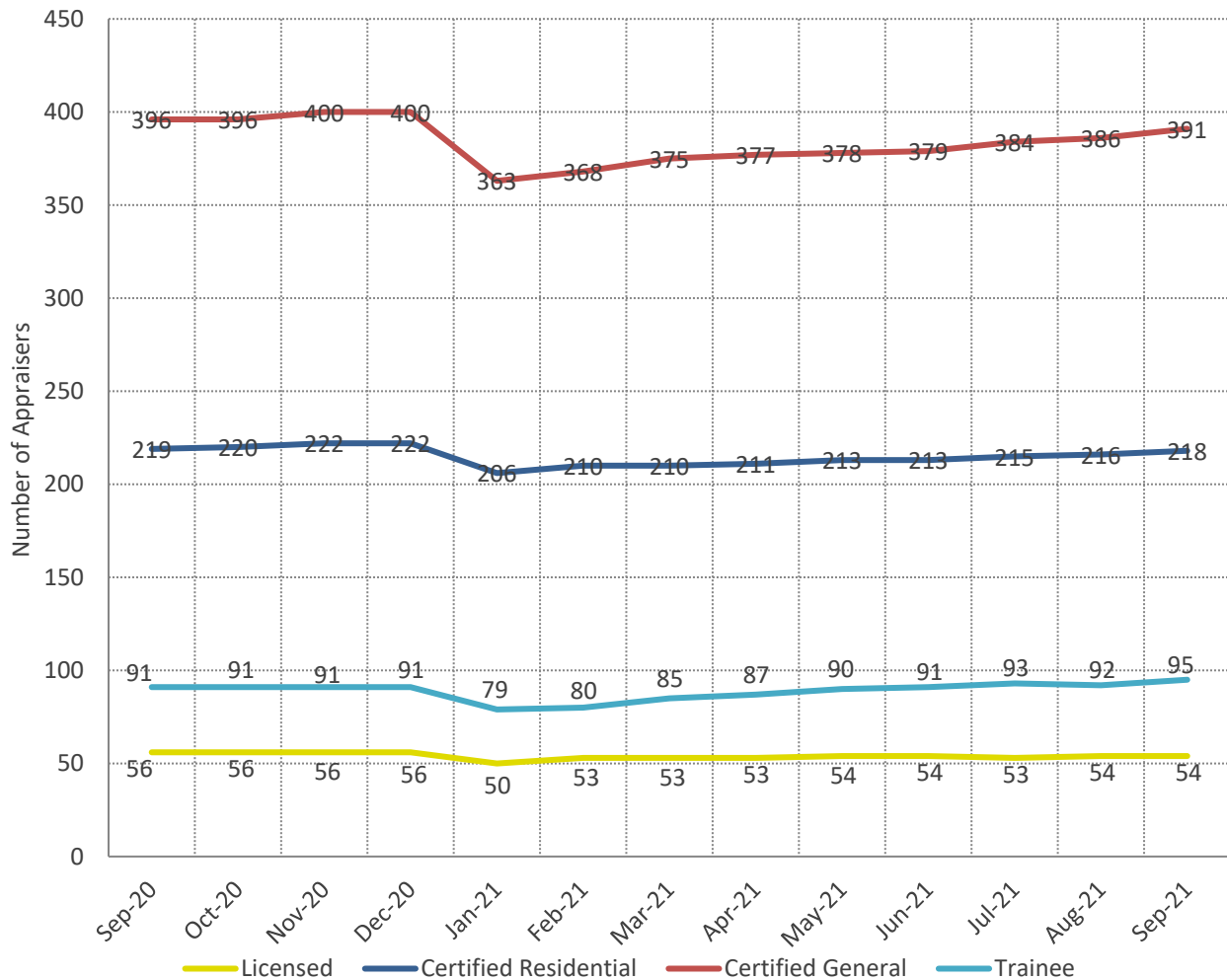
Total Real Property Appraisers by Classification -
Five Year Trend



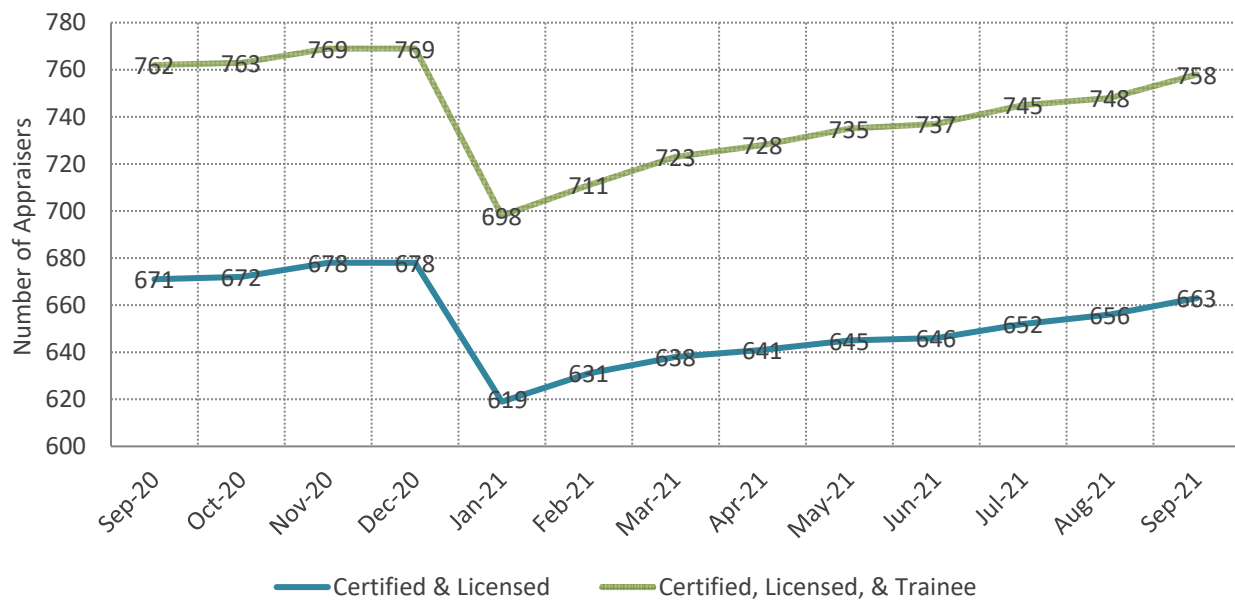
Total Real Property Appraisers - Five Year Trend



Real Property Appraisers by Classification - Thirteen Month Trend

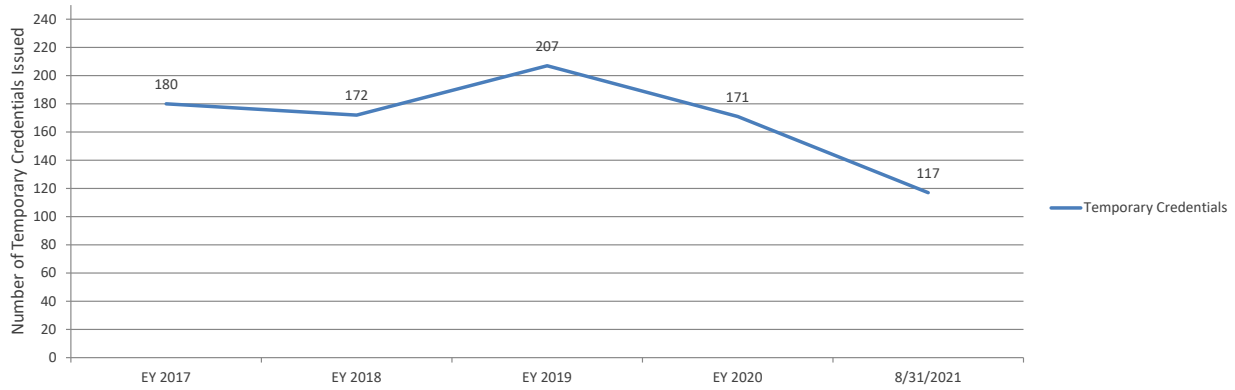


Total Real Property Appraisers - Thirteen Month Trend

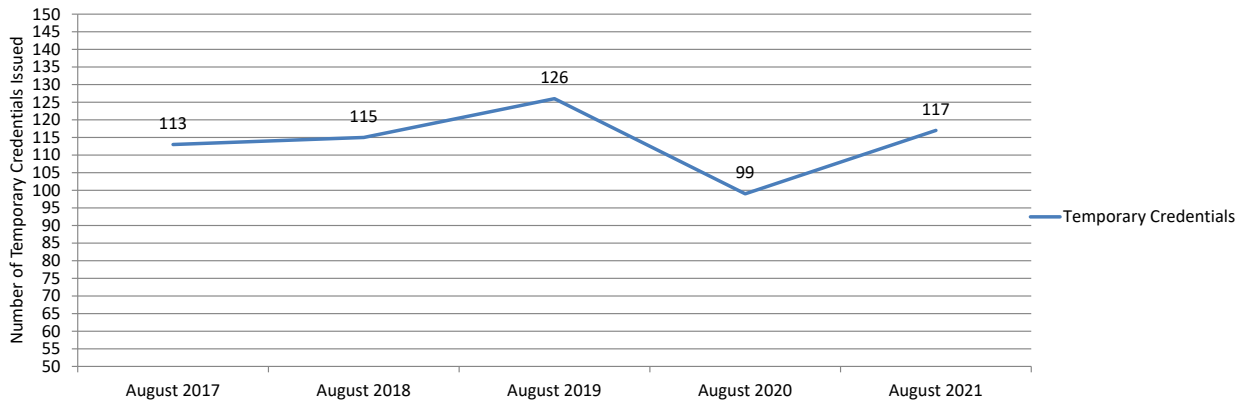


Temporary Real Property Appraiser Report

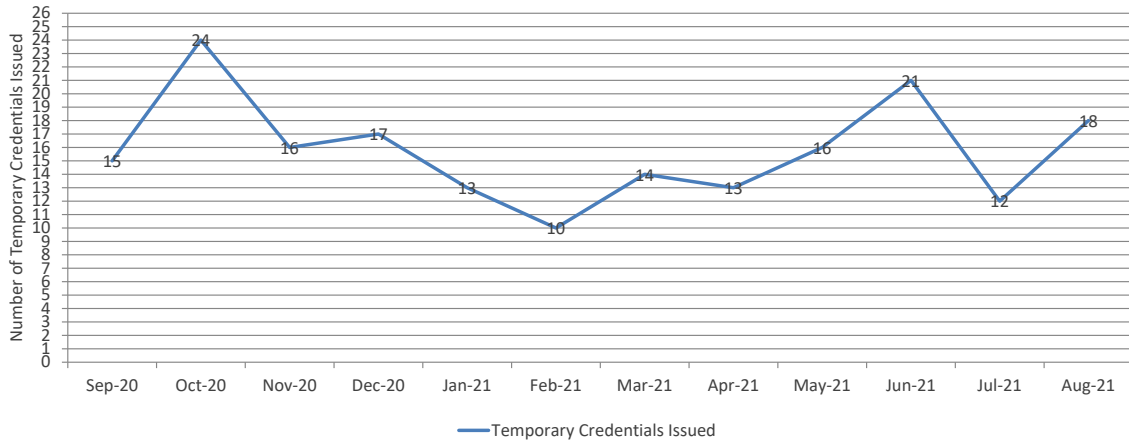
Temporary Real Property Appraiser Credentials Issued by Calendar Year - Five Year Trend



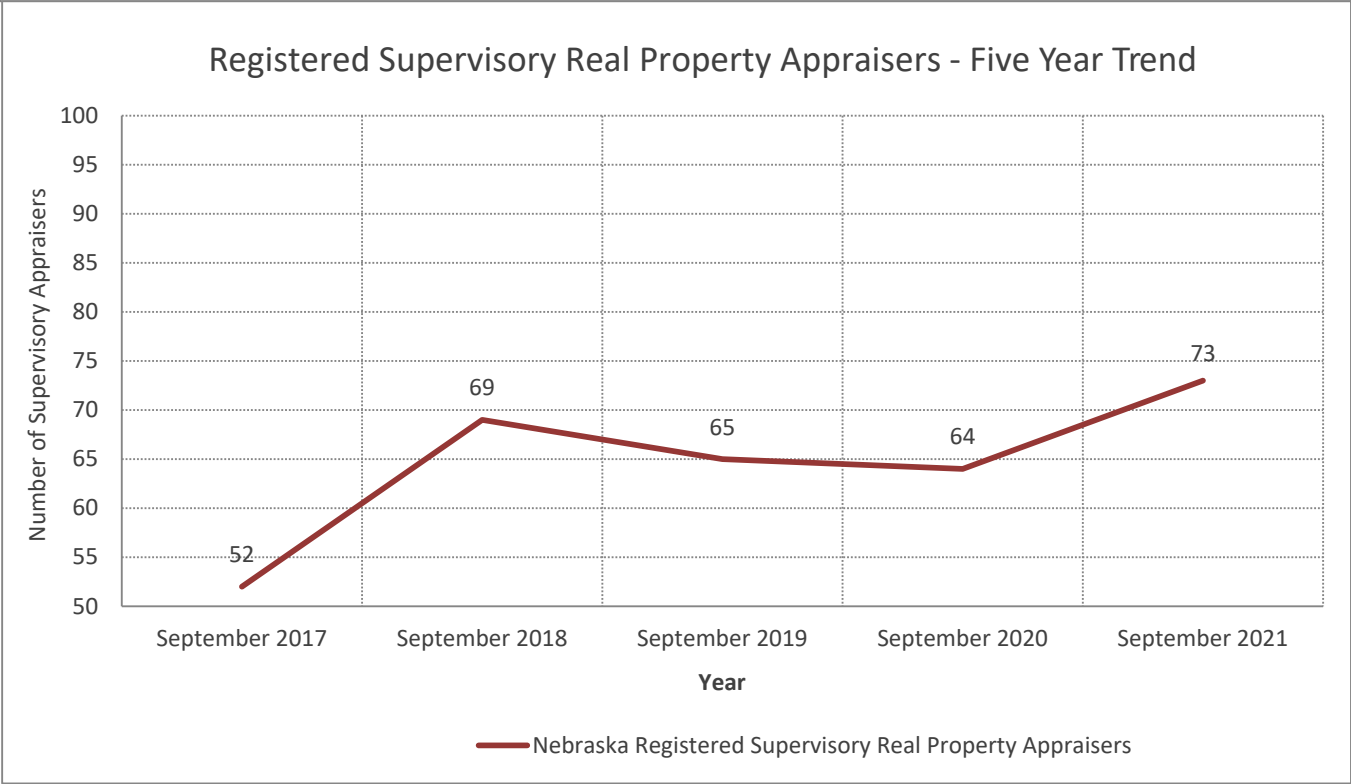
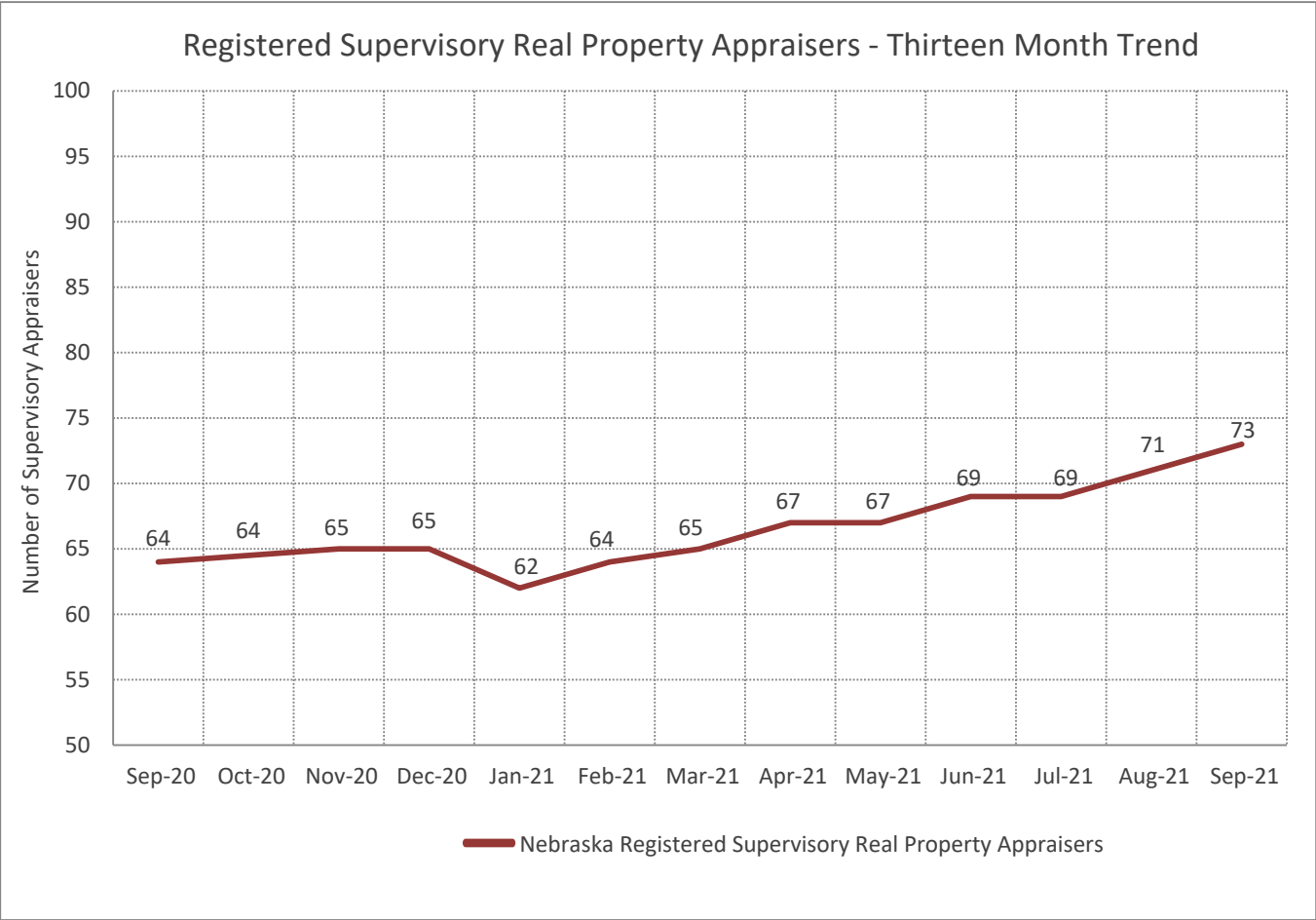
Year-to-date Temporary Real Property Appraiser Credentials Issued - Five Year Trend



Temporary Real Property Appraiser Credentials Issued by Month - Twelve Month Trend

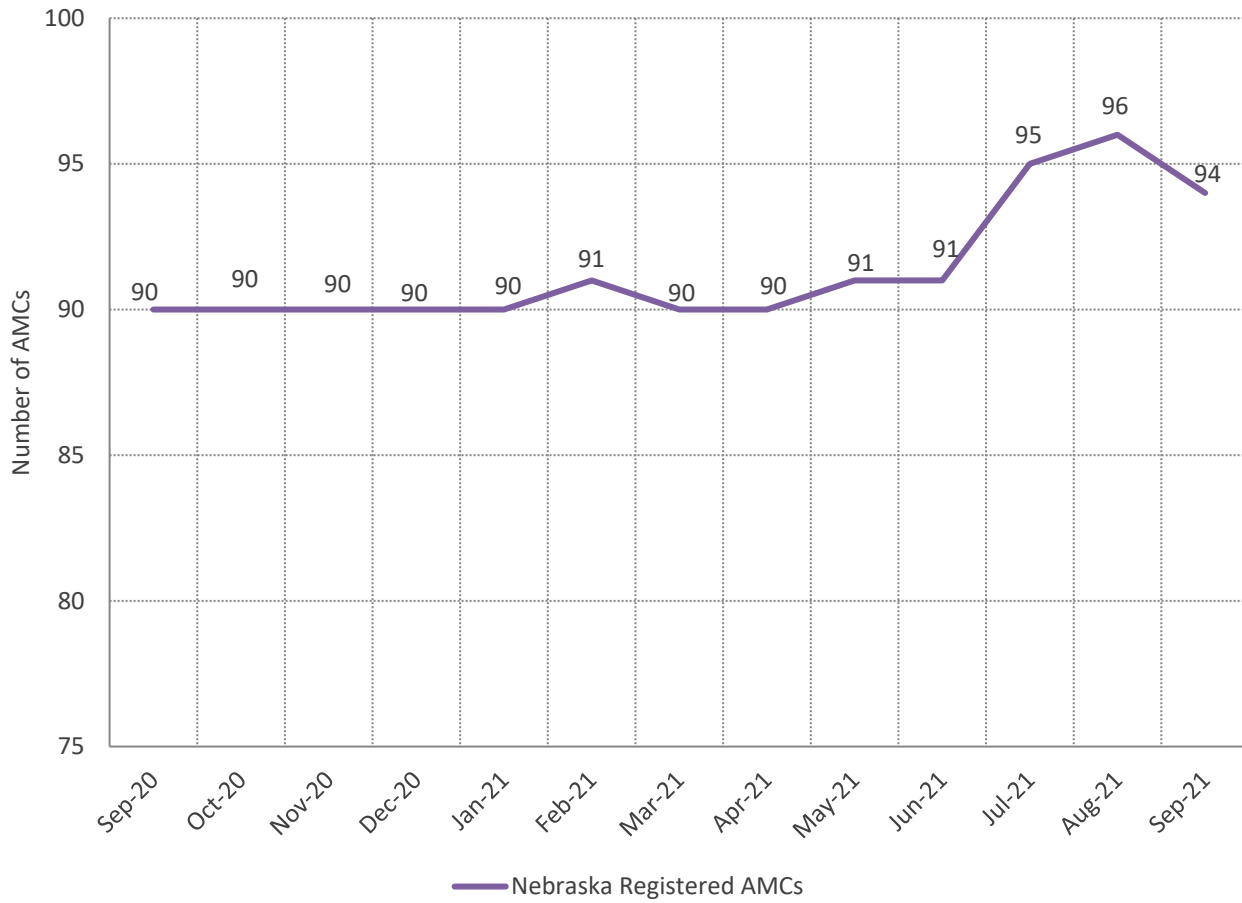


Supervisory Real Property Appraiser Report

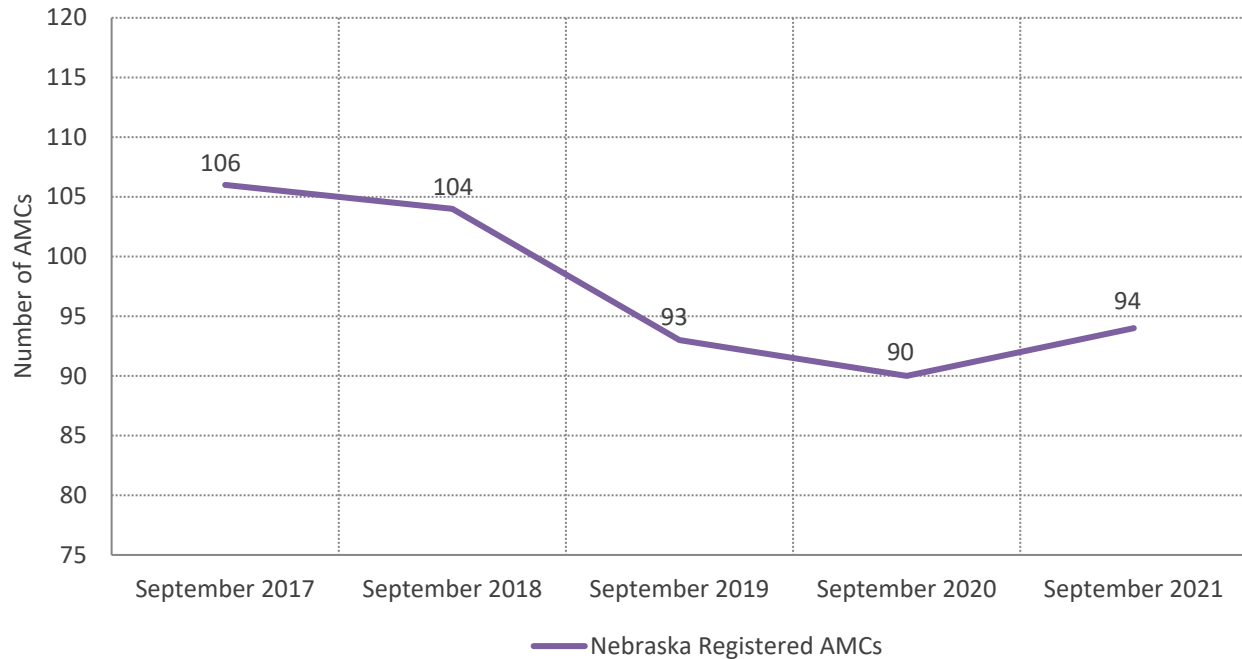


Appraisal Management Company Report

Appraisal Management Companies - Thirteen Month Trend



Appraisal Management Companies - Five Year Trend



NEBRASKA REAL PROPERTY APPRAISER BOARD

DIRECTOR APPROVAL OF REAL PROPERTY APPRAISER APPLICANTS

August 11, 2021 – September 7, 2021

<i>New Trainee Real Property Appraisers</i>		
T2021021	Danielle Sullivan	Approved August 17, 2021
T2021023	John Stephens	Approved August 25, 2021
T2021024	Blythe McAfee	Approved August 27, 2021
<i>New Certified Residential Real Property Appraisers through Reciprocity</i>		
CR2021008R	Melanie Courtney	Approved August 24, 2021
<i>New Certified General Real Property Appraisers through Reciprocity</i>		
CG2021012R	Geraldine Fitapelli-Armalavage	Approved August 13, 2021
CG2021013R	Amy Earnheart	Approved August 24, 2021
CG2021015R	Benjamin Miles	Approved August 24, 2021
CG2021016R	Jamie Rich	Approved August 24, 2021

2021-22 Nebraska Real Property Appraiser Board Goals and Objectives
June 16, 2021 Strategic Planning Meeting

	SHORT TERM GOALS / OBJECTIVES	EXPECTED COMPLETION DATE	STATUS/GOAL MET	LONG TERM GOALS / OBJECTIVES	EXPECTED COMPLETION DATE	NOTES
LAWS, RULES, AND GUIDANCE DOCUMENTS	Work with the Banking Commerce and Insurance Legislative Committee's Legal Counsel to draft a bill to be introduced addressing the changes needed in the Real Property Appraiser Act, which includes but is not limited to the incorporation of PAREA as an alternative to real property appraisal practice experience and removing the limitation that a real property appraiser cannot represent him or herself as a property owner for property tax purposes.	12/31/2021	First draft of RPAA completed.	Address changes to USPAP, Real Property Appraiser Qualifications Criteria, ASC Policy Statements, AQB CAP Program Guidelines, and Title XI as required.	Ongoing.	
	Remove engagement letter completion date requirement for issuance of a temporary real property appraiser credential from the Real Property Appraiser Act.	12/31/2021	First draft of RPAA completed.	Harmonize Title 298 with the changes made to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act as needed.	Ongoing.	
	Adopt Title 298 changes to reduce unnecessary regulatory burden and remove barriers to entry into the real property appraiser profession, provide for better clarification and administration, and harmonize Title 298 with the changes made to the Nebraska Real Property Appraiser Act through LB808 in 2020 and LB23 in 2021.	12/31/2021	Adopted draft sent to Attorney General's Office for review on August 23, 2021.	Continue to monitor the effectiveness of regulations to reduce unnecessary regulatory burden, remove barriers to entry into the real property appraiser profession, maintain an effective education program, and provide for better clarification and administration.	Ongoing.	
				Continue to adopt Guidance Documents for public advisement concerning interpretation of statutes and rules, and retire Guidance Documents that are no longer relevant.	Ongoing.	
				Continue to adopt internal procedures as needed to assist with the Board's administration of its programs, and retire internal procedures that are no longer relevant.	Ongoing.	
COMPLIANCE	None			Continue monitoring the effectiveness and efficiency of the Compliance Program.	Ongoing.	
CREDENTIALING AND REGISTRATION	Explore development of a supervisory real property appraiser eligibility list derived from a question on the Application for Renewal of Nebraska Real Property Appraiser Credential.	6/30/2022	Estimate received from CIO on June 24, 2021 (20392-Potential Supervisory Real Property Appraiser List Derived from Application for Renewal of Nebraska Real Property Appraiser Credential Question). Board approved project at July 15, 2021 meeting. No progress made by CIO to date.	Explore opportunities to increase the number of Nebraska resident real property appraisers.	Ongoing.	
	Explore change to testing service provider.	12/31/2021	Contacted Pearson Vue and Prometric. After discussion with TAF, it was discovered that Pearson Vue and PSI are the only approved testing service providers for the national appraiser exam administration. Response from Pearson Vue will be presented to the Board for review when received. Second contact attempt made on August 9, 2021.			
	Limit the disciplinary action reporting requirement to a set number of years based on reasonableness on the applications for credentialing.	12/31/2021	Completed July 15, 2021.			
EDUCATION	None.			None.		
PERSONNEL	None.			Continue updating the policies and procedures documents as needed to ensure compliance with state policy changes, NAPE/ASFCME contract changes, and to address general work environment needs and/or changes.	Ongoing.	
				Continue utilization of two interns to assist with processing real property appraiser renewal applications.	Ongoing.	

2021-22 Nebraska Real Property Appraiser Board Goals and Objectives
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PUBLIC INFORMATION	Explore addition of a solid or scrolling message screen at the top of the NRPAB website for use to disseminate relevant timely information, such as notices of meetings.	6/30/2022		Encourage development of Memos from the Board and Facebook posts that contain facts of interest to the appraiser community.	Ongoing.	
				Continue utilizing the NRPAB website, NRPAB Facebook page, The Nebraska Appraiser, and Memos from the Board to disseminate relevant and important information to the appraisal business community and the general public in a timely manner. This includes information related to state and federal regulations, credentialing and registration requirements, renewal information, education information, Board policies and procedures, and other information that affects the industry.	Ongoing.	
				Continue utilization of Memos from the Board to disseminate important information in a timely manner that should not be held for the next release of The Nebraska Appraiser.	Ongoing.	
				Continue releasing new issues of The Nebraska Appraiser on a quarterly basis to disseminate important information to the appraisal business community and the general public in an effective and efficient manner.	Ongoing.	
				Continue releasing new issues of The Nebraska Appraiser on a quarterly basis to disseminate important information to the appraisal business community and the general public in an effective and efficient manner.	Ongoing.	
				Continue to monitor the effectiveness of current NRPAB website, and repair bugs and make improvements and add enhancements needed to address functionality or use.	Ongoing.	
				Explore the development and implementation of an updated NRPAB logo.	None.	
ADMINISTRATION	Explore the purchase and installation of video equipment and software needed to hold NRPAB meetings by virtual conferencing under the Open Meetings Act.	6/30/2022	Approval requested for purchase of Meeting Owl Pro and accessories.	Continue to monitor the effectiveness of current processes and procedures, and update processes and procedures as needed to maintain effectiveness and efficiency of the administration of the Board's programs.	Ongoing.	
	Explore use of Federal grant money to pursue development of a translator system between the NRPAB Database and the ASC Federal Registry system.	6/30/2022	Additional request for estimate made to CIO on June 23, 2021 (20397 - Develop API Translator between NRPAB Database and the ASC Federal Registries for Real Property Appraisers and AMCs). No estimate provided by CIO to date.	Continue to monitor the effectiveness of current NRPAB database, repair bugs, and make improvements and add enhancements needed to address program or use changes.	Ongoing.	
	Explore online AMC renewal application and upgrade to the AMC Interface in the NRPAB Database.	6/30/2022	Additional request for estimate made to CIO on June 23, 2021 (14261 - AMC Renewal Online Application and Interface). No estimate provided by CIO to date.	Explore online real property appraiser initial applications (Reciprocity; E,E,&E; Temporary) AMC initial applications, education activity applications, and other services that require payment of a fee.	None.	
				Continue to transfer remaining paper files to electronic file format.	Ongoing.	
FINANCIALS	None.			None.		

2021-22 NRPAB SWOT Analysis			
STRENGTHS: <ul style="list-style-type: none"> - Customer service - Organization - Staff depth - Staff knowledge - Adaptability - Professional Diversity of Board - Modernization of Accessibility 	WEAKNESSES: <ul style="list-style-type: none"> - Inability to grow the industry - Efficiency loss due to database - Size of agency - Regulatory and statutory regulations 	OPPORTUNITIES: <ul style="list-style-type: none"> - Growth in appraiser field - Continually evaluate how the Board and Agency operate 	THREATS: <ul style="list-style-type: none"> - Agency turnover - Federal agency oversight - State economic climate - Aging appraiser population

Agency 053 REAL PROPERTY APPRAISER BD
 Division 000 Real Property App Bd
 Program 079 APPRAISER LICENSING

Percent of Time Elapsed = 16.99

ACCOUNT CODE DESCRIPTION		BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
BUDGETED FUND TYPES - EXPENDITURES							
510000 PERSONAL SERVICES							
511100	PERMANENT SALARIES-WAGES	140,527.00	10,999.92	22,324.35	15.89	5,076.03	113,126.62
511300	OVERTIME PAYMENTS	1,503.00		221.54	14.74		1,281.46
511600	PER DIEM PAYMENTS	9,100.00		400.00	4.40		8,700.00
511700	EMPLOYEE BONUSES	1,000.00					1,000.00
511800	COMP TIME PAYMENT	1,502.00					1,502.00
512100	VACATION LEAVE EXPENSE	11,267.00	1,545.06	2,022.80	17.95	222.14	9,022.06
512200	SICK LEAVE EXPENSE	3,136.00					3,136.00
512300	HOLIDAY LEAVE EXPENSE	8,154.00		627.24	7.69		7,526.76
Personal Services Subtotal		176,189.00	12,544.98	25,595.93	14.53	5,298.17	145,294.90
515100	RETIREMENT PLANS EXPENSE	12,532.00	939.34	1,886.64	15.05	396.72	10,248.64
515200	FICA EXPENSE	13,479.00	870.33	1,779.37	13.20	360.64	11,338.99
515500	HEALTH INSURANCE EXPENSE	32,903.00	2,741.90	5,483.80	16.67		27,419.20
516300	EMPLOYEE ASSISTANCE PRO	37.08		37.08	100.00		
516500	WORKERS COMP PREMIUMS	1,528.00	1,528.00	1,528.00	100.00		
Major Account 510000 Total		236,668.08	18,624.55	36,310.82	15.34	6,055.53	194,301.73
520000 OPERATING EXPENSES							
521100	POSTAGE EXPENSE	2,500.00	305.86	794.85	31.79		1,705.15
521300	FREIGHT	200.00					200.00
521400	DATA PROCESSING EXPENSE	29,890.00	2,164.32	4,011.14	13.42		25,878.86
521500	PUBLICATION & PRINT EXPENSE	3,000.00	508.84	508.84	16.96		2,491.16
521900	AWARDS EXPENSE	150.00					150.00
522100	DUES & SUBSCRIPTION EXPENSE	350.00					350.00
522200	CONFERENCE REGISTRATION	1,080.00	515.00	515.00	47.69		565.00
524600	RENT EXPENSE-BUILDINGS	11,279.00	976.15	1,988.51	17.63		9,290.49
524900	RENT EXP-DUPR SURCHARGE	3,859.00	321.59	643.18	16.67		3,215.82
527100	REP & MAINT-OFFICE EQUIP	500.00					500.00
531100	OFFICE SUPPLIES EXPENSE	2,000.00		1,014.40	50.72		985.60
532100	NON CAPITALIZED EQUIP PU	500.00					500.00
533100	HOUSEHOLD & INSTIT EXP	235.00					235.00
534900	MISCELLANEOUS SUPPLIES EXPENSE	50.00					50.00
541100	ACCTG & AUDITING SERVICES	1,037.00		1,037.00	100.00		

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Agency 053 REAL PROPERTY APPRAISER BD
Division 000 Real Property App Bd
Program 079 APPRAISER LICENSING

Percent of Time Elapsed = 16.99

ACCOUNT CODE DESCRIPTION		BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
541200	PURCHASING ASSESSMENT	90.00	83.00	83.00	92.22		7.00
541500	LEGAL SERVICES EXPENSE	35,000.00					35,000.00
541700	LEGAL RELATED EXPENSE	7,000.00		13.50	.19		6,986.50
542100	SOS TEMP SERV-PERSONNEL	7,680.00					7,680.00
547100	EDUCATIONAL SERVICES	1,500.00	19.00	19.00	1.27		1,481.00
554900	OTHER CONTRACTUAL SERVICE	40,000.00	769.25	3,555.25	8.89		36,444.75
556100	INSURANCE EXPENSE	21.00					21.00
556300	SURETY & NOTARY BONDS	26.00					26.00
559100	OTHER OPERATING EXP	1,197.92					1,197.92
Major Account 520000 Total		149,144.92	5,663.01	14,183.67	9.51	0.00	134,961.25
570000 TRAVEL EXPENSES							
571100	BOARD & LODGING	4,850.00	96.00	384.00	7.92		4,466.00
571600	MEALS-NOT TRAVEL STATUS	100.00					100.00
571800	TAXABLE TRAVEL EXPENSES	1,871.00	57.76	154.02	8.23		1,716.98
572100	COMMERCIAL TRANSPORTATION	1,950.00					1,950.00
573100	STATE-OWNED TRANSPORT	200.00					200.00
574500	PERSONAL VEHICLE MILEAGE	9,736.00	476.00	763.84	7.85		8,972.16
575100	MISC TRAVEL EXPENSES	966.00	25.00	63.75	6.60		902.25
Major Account 570000 Total		19,673.00	654.76	1,365.61	6.94	0.00	18,307.39
BUDGETED EXPENDITURES TOTAL		405,486.00	24,942.32	51,860.10	12.79	6,055.53	347,570.37

SUMMARY BY FUND TYPE - EXPENDITURES

2	CASH FUNDS	405,486.00	24,942.32	51,860.10	12.79	6,055.53	347,570.37
BUDGETED EXPENDITURES TOTAL		405,486.00	24,942.32	51,860.10	12.79	6,055.53	347,570.37

BUDGETED FUND TYPES - REVENUES

470000 REVENUE - SALES AND CHARGES

471100	SALE OF SERVICES	350.00-		25.00-	7.14		325.00-
471120	QUALIFYING ED COURSE FEES	750.00-		300.00-	40.00		450.00-
471121	CONTINUING ED NEW FEES	1,250.00-	100.00-	150.00-	12.00		1,100.00-
471122	CONTINUING ED RENEWAL FEES	100.00-	40.00-	60.00-	60.00		40.00-
475150	CERTIFIED GENERAL NEW FEES	7,500.00-	600.00-	1,200.00-	16.00		6,300.00-

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STATE OF NEBRASKA
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Agency 053 REAL PROPERTY APPRAISER BD
Division 000 Real Property App Bd
Program 079 APPRAISER LICENSING

Percent of Time Elapsed = 16.99

ACCOUNT CODE DESCRIPTION		BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
475151	LICENSED NEW FEES	300.00-		300.00-	100.00		
475152	FINGERPRINT FEES	2,580.00-	543.00-	859.75-	33.32		1,720.25-
475153	CERTIFIED RESIDENTIAL NEW	2,400.00-	300.00-	900.00-	37.50		1,500.00-
475154	CERTIFIED GENERAL RENEWAL	80,025.00-	3,850.00-	9,075.00-	11.34		70,950.00-
475155	LICENSED RENEWAL	11,000.00-					11,000.00-
475156	FINGERPRINT AUDIT PROGRAM FEES	2,900.00-	145.00-	265.00-	9.14		2,635.00-
475157	CERTIFIED RESIDENTIAL RENEWAL	50,875.00-	3,025.00-	3,300.00-	6.49		47,575.00-
475161	TEMPORARY CERTIFIED GENERAL	9,000.00-	700.00-	1,350.00-	15.00		7,650.00-
475163	AMC REGISTERED NEW FEES	12,000.00-	2,500.00	4,000.00-	33.33		8,000.00-
475164	AMC APPLICATION FEES	2,100.00-		700.00-	33.33		1,400.00-
475165	AMC REGISTERED RENEWAL	126,000.00-	10,500.00-	16,500.00-	13.10		109,500.00-
475167	CERTIFIED RESIDENTIAL INACTIVE	300.00-					300.00-
475168	CERTIFIED GENERAL INACTIVE	300.00-					300.00-
475234	APPLICATION FEES	26,550.00-	3,300.00-	5,650.00-	21.28		20,900.00-
Major Account 470000 Total		336,280.00-	20,603.00-	44,634.75-	13.27	0.00	291,645.25-
480000 REVENUE - MISCELLANEOUS							
481100	INVESTMENT INCOME	6,250.00-	787.82-	1,632.20-	26.12		4,617.80-
481101	AMC INVESTMENT INCOME	5,750.00-					5,750.00-
484500	REIMB NON-GOVT SOURCES	5,000.00-		173.59-	3.47		4,826.41-
Major Account 480000 Total		17,000.00-	787.82-	1,805.79-	10.62	0.00	15,194.21-
BUDGETED REVENUE TOTAL		353,280.00-	21,390.82-	46,440.54-	13.15	0.00	306,839.46-
SUMMARY BY FUND TYPE - REVENUE							
2	CASH FUNDS	353,280.00-	21,390.82-	46,440.54-	13.15		306,839.46-
BUDGETED REVENUE TOTAL		353,280.00-	21,390.82-	46,440.54-	13.15	0.00	306,839.46-

Agency 053 REAL PROPERTY APPRAISER BD
 Division 000 AGENCY DEFINED DIVISION
 Grant

STATE OF NEBRASKA
 MTD General Ledger Detail
 All Objects
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Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25310	079	000	53105018.471121.		400957	08/02/21	RC	RB	NRPAB DEPOSIT 210802	6425019		25.00-
25310	079	000	53105018.471121.		405312	08/30/21	RC	RB	NRPAB DEPOSIT 210830	6454299		75.00-
Total for Object			471121 CONTINUING ED NEW FEES									100.00-
25310	079	000	53105018.471122.		402296	08/10/21	RC	RB	NRPAB DEPOSIT 210810	6433508		50.00-
25310	079	000	53105018.471122.		47691749	08/18/21	PV	V	APPRAISAL INSTITUTE	6443096		20.00
25310	079	000	53105018.471122.		404498	08/24/21	RC	RB	NRPAB DEPOSIT 210824	6447850		10.00-
Total for Object			471122 CONTINUING ED RENEWAL FEES									40.00-
25310	079	000	53105018.475150.		404498	08/24/21	RC	RB	NRPAB DEPOSIT 210824	6447850		300.00-
25310	079	000	53105018.475150.		405312	08/30/21	RC	RB	NRPAB DEPOSIT 210830	6454299		300.00-
Total for Object			475150 CERTIFIED GENERAL NEW FEES									600.00-
25310	079	000	53105018.475152.		401064	08/03/21	RC	RB	NRPAB DEPOSIT 210803	6426077		45.25-
25310	079	000	53105018.475152.		401577	08/05/21	RC	RB	NRPAB DEPOSIT 210805	6429027		90.50-
25310	079	000	53105018.475152.		402047	08/09/21	RC	RB	NRPAB DEPOSIT 210809	6431930		90.50-
25310	079	000	53105018.475152.		402296	08/10/21	RC	RB	NRPAB DEPOSIT 210810	6433508		45.25-
25310	079	000	53105018.475152.		402480	08/11/21	RC	RB	NRPAB DEPOSIT 210811	6435254		45.25-
25310	079	000	53105018.475152.		403677	08/18/21	RC	RB	NRPAB DEPOSIT 210818	6442099		45.25-
25310	079	000	53105018.475152.		404498	08/24/21	RC	RB	NRPAB DEPOSIT 210824	6447850		90.50-
25310	079	000	53105018.475152.		404645	08/25/21	RC	RB	NRPAB DEPOSIT 210825	6449315		45.25-
25310	079	000	53105018.475152.		404835	08/26/21	RC	RB	NRPAB DEPOSIT 210826	6450958		45.25-
Total for Object			475152 FINGERPRINT FEES									543.00-
25310	079	000	53105018.475153.		404835	08/26/21	RC	RB	NRPAB DEPOSIT 210826	6450958		300.00-
Total for Object			475153 CERTIFIED RESIDENTIAL NEW									300.00-
25310	079	000	53105018.475154.		401089	08/02/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210802	6425619		550.00-
25310	079	000	53105018.475154.		401577	08/05/21	RC	RB	NRPAB DEPOSIT 210805	6429027		275.00-
25310	079	000	53105018.475154.		402047	08/09/21	RC	RB	NRPAB DEPOSIT 210809	6431930		275.00-
25310	079	000	53105018.475154.		402293	08/10/21	RC	RB	NRPAB RENEWALS DEPOSIT 210810	6433530		550.00-
25310	079	000	53105018.475154.		402719	08/11/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210811	6436054		550.00-
25310	079	000	53105018.475154.		403677	08/18/21	RC	RB	NRPAB DEPOSIT 210818	6442099		550.00-
25310	079	000	53105018.475154.		404998	08/25/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210825	6450162		550.00-
25310	079	000	53105018.475154.		405121	08/26/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210826	6452686		550.00-
Total for Object			475154 CERTIFIED GENERAL RENEWAL									3,850.00-
25310	079	000	53105018.475156.		401089	08/02/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210802	6425619		10.00-
25310	079	000	53105018.475156.		401427	08/03/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210803	6426891		10.00-

Agency 053 REAL PROPERTY APPRAISER BD
 Division 000 AGENCY DEFINED DIVISION
 Grant

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Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25310	079	000	53105018.475156.		401335	08/04/21	RC	RB	NRPAB DEPOSIT 210804	6427502		5.00-
25310	079	000	53105018.475156.		401577	08/05/21	RC	RB	NRPAB DEPOSIT 210805	6429027		5.00-
25310	079	000	53105018.475156.		402065	08/06/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210806	6431726		20.00-
25310	079	000	53105018.475156.		402047	08/09/21	RC	RB	NRPAB DEPOSIT 210809	6431930		5.00-
25310	079	000	53105018.475156.		402293	08/10/21	RC	RB	NRPAB RENEWALS DEPOSIT 210810	6433530		10.00-
25310	079	000	53105018.475156.		402719	08/11/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210811	6436054		20.00-
25310	079	000	53105018.475156.		403677	08/18/21	RC	RB	NRPAB DEPOSIT 210818	6442099		10.00-
25310	079	000	53105018.475156.		403925	08/18/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210818	6443050		10.00-
25310	079	000	53105018.475156.		404713	08/24/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210824	6448747		10.00-
25310	079	000	53105018.475156.		404998	08/25/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210825	6450162		10.00-
25310	079	000	53105018.475156.		404835	08/26/21	RC	RB	NRPAB DEPOSIT 210826	6450958		5.00-
25310	079	000	53105018.475156.		405121	08/26/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210826	6452686		10.00-
25310	079	000	53105018.475156.		405312	08/30/21	RC	RB	NRPAB DEPOSIT 210830	6454299		5.00-
Total for Object			475156 FINGERPRINT AUDIT PROGRAM FEES									145.00-
25310	079	000	53105018.475157.		401335	08/04/21	RC	RB	NRPAB DEPOSIT 210804	6427502		275.00-
25310	079	000	53105018.475157.		402065	08/06/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210806	6431726		1,100.00-
25310	079	000	53105018.475157.		403925	08/18/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210818	6443050		550.00-
25310	079	000	53105018.475157.		404713	08/24/21	RC	RB	NRPAB RENEW EFW DEPOSIT 210824	6448747		550.00-
25310	079	000	53105018.475157.		404835	08/26/21	RC	RB	NRPAB DEPOSIT 210826	6450958		275.00-
25310	079	000	53105018.475157.		405312	08/30/21	RC	RB	NRPAB DEPOSIT 210830	6454299		275.00-
Total for Object			475157 CERTIFIED RESIDENTIAL RENEWAL									3,025.00-
25310	079	000	53105018.475161.		47577508	08/01/21	PV	V	MAAS & ASSOCIATES INC	6421364		50.00
25310	079	000	53105018.475161.		401064	08/03/21	RC	RB	NRPAB DEPOSIT 210803	6426077		150.00-
25310	079	000	53105018.475161.		402296	08/10/21	RC	RB	NRPAB DEPOSIT 210810	6433508		100.00-
25310	079	000	53105018.475161.		403113	08/16/21	RC	RB	NRPAB DEPOSIT 210816	6439123		150.00-
25310	079	000	53105018.475161.		403677	08/18/21	RC	RB	NRPAB DEPOSIT 210818	6442099		50.00-
25310	079	000	53105018.475161.		403894	08/19/21	RC	RB	NRPAB DEPOSIT 210819	6443551		100.00-
25310	079	000	53105018.475161.		404498	08/24/21	RC	RB	NRPAB DEPOSIT 210824	6447850		100.00-
25310	079	000	53105018.475161.		404835	08/26/21	RC	RB	NRPAB DEPOSIT 210826	6450958		100.00-
Total for Object			475161 TEMPORARY CERTIFIED GENERAL									700.00-
25310	079	000	53105018.475234.		401064	08/03/21	RC	RB	NRPAB DEPOSIT 210803	6426077		450.00-
25310	079	000	53105018.475234.		401577	08/05/21	RC	RB	NRPAB DEPOSIT 210805	6429027		300.00-
25310	079	000	53105018.475234.		402047	08/09/21	RC	RB	NRPAB DEPOSIT 210809	6431930		300.00-
25310	079	000	53105018.475234.		402296	08/10/21	RC	RB	NRPAB DEPOSIT 210810	6433508		350.00-
25310	079	000	53105018.475234.		402480	08/11/21	RC	RB	NRPAB DEPOSIT 210811	6435254		150.00-
25310	079	000	53105018.475234.		403113	08/16/21	RC	RB	NRPAB DEPOSIT 210816	6439123		300.00-

Agency 053 REAL PROPERTY APPRAISER BD
 Division 000 AGENCY DEFINED DIVISION
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STATE OF NEBRASKA
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Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25310	079	000	53105018.475234.		403677	08/18/21	RC	RB	NRPAB DEPOSIT 210818	6442099		250.00-
25310	079	000	53105018.475234.		403894	08/19/21	RC	RB	NRPAB DEPOSIT 210819	6443551		200.00-
25310	079	000	53105018.475234.		404498	08/24/21	RC	RB	NRPAB DEPOSIT 210824	6447850		500.00-
25310	079	000	53105018.475234.		404645	08/25/21	RC	RB	NRPAB DEPOSIT 210825	6449315		150.00-
25310	079	000	53105018.475234.		404835	08/26/21	RC	RB	NRPAB DEPOSIT 210826	6450958		350.00-
Total for Object			475234 APPLICATION FEES									3,300.00-
25310	079	000	53105018.481100.		16561135	08/25/21	JE	G	OIP July 2021 1.33407%	6450553		430.13-
Total for Object			481100 INVESTMENT INCOME									430.13-
25310	079	000	53105018.511100.		3158704	08/11/21	T2	7	PAYROLL LABOR DISTRIBUTION	6426909		3,306.48
25310	079	000	53105018.511100.		3158971	08/25/21	T2	7	PAYROLL LABOR DISTRIBUTION	6443153		3,843.58
Total for Object			511100 PERMANENT SALARIES-WAGES									7,150.06
25310	079	000	53105018.512100.		3158704	08/11/21	T2	7	PAYROLL LABOR DISTRIBUTION	6426909		770.63
25310	079	000	53105018.512100.		3158971	08/25/21	T2	7	PAYROLL LABOR DISTRIBUTION	6443153		233.54
Total for Object			512100 VACATION LEAVE EXPENSE									1,004.17
25310	079	000	53105018.515100.		3158705	08/11/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6426909		305.29
25310	079	000	53105018.515100.		3158972	08/25/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6443153		305.29
Total for Object			515100 RETIREMENT PLANS EXPENSE									610.58
25310	079	000	53105018.515200.		3158705	08/11/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6426909		282.83
25310	079	000	53105018.515200.		3158972	08/25/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6443153		282.87
Total for Object			515200 FICA EXPENSE									565.70
25310	079	000	53105018.515500.		3158705	08/11/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6426909		891.13
25310	079	000	53105018.515500.		3158972	08/25/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6443153		891.12
Total for Object			515500 HEALTH INSURANCE EXPENSE									1,782.25
25310	079	000	53105018.516500.		47591875	08/01/21	PV	V	AS - RISK MANAGEMENT DIVISION	6422855		993.20
Total for Object			516500 WORKERS COMP PREMIUMS									993.20
25310	079	000	53105018.521100.		16501769	08/16/21	JE	G	POSTAGE DUE JUL 2021	6440787		305.86
25310	079	000	53105018.521100.		16550043	08/23/21	JE	G	NRPAB POSTAGE JULY 2021	6448092		107.05-
Total for Object			521100 POSTAGE EXPENSE									198.81
25310	079	000	53105018.521400.		47577516	08/01/21	PV	V	AS - OCIO - COMMUNICATIONS	6421389		110.70
25310	079	000	53105018.521400.		47640442	08/09/21	PV	V	AS - OCIO - IMSERVICES	6433978		951.65

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STATE OF NEBRASKA
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Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
Total for Object			521400	CIO CHARGES								962.05
25310	079	000	53105018.521500.		16313263	08/17/21	J9	G	COPY SERVICES APR-JUN 2021	6406311		470.40
25310	079	000	53105018.521500.		47640430	08/09/21	PV	V	LINCOLN JOURNAL STAR - PAYMENT	6433968		24.99
25310	079	000	53105018.521500.		16550042	08/23/21	JE	G	NRPA COPY SERV APR-JUN 2021	6448084		164.64-
Total for Object			521500	PUBLICATION & PRINT EXP								330.75
25310	079	000	53105018.522200.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		334.75
Total for Object			522200	CONFERENCE REGISTRATION								334.75
25310	079	000	53105018.524600.		16401459	08/01/21	JE	G	NRPA RENT JUL 2021	6421313		328.98-
25310	079	000	53105018.524600.		16413818	08/06/21	JE	G	RENT & LB530 AUG 2021 - OTHER	6424430		939.94
25310	079	000	53105018.524600.		16497156	08/13/21	JE	G	NRPA RENT AUG 2021	6439133		328.98-
25310	079	000	53105018.524600.		47662693	08/13/21	PV	V	SECRETARY OF STATE	6439501		23.54
Total for Object			524600	RENT EXPENSE-BUILDINGS								305.52
25310	079	000	53105018.524900.		16401459	08/01/21	JE	G	NRPA RENT JUL 2021	6421313		112.56-
25310	079	000	53105018.524900.		16413818	08/06/21	JE	G	RENT & LB530 AUG 2021 - OTHER	6424430		321.59
25310	079	000	53105018.524900.		16497156	08/13/21	JE	G	NRPA RENT AUG 2021	6439133		112.56-
Total for Object			524900	RENT EXP-DEPR SURCHARGE								96.47
25310	079	000	53105018.539500.		47619221	08/03/21	PC	V	Purchase Card Offset	6427024		611.00
25310	079	000	53105018.539500.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		611.00-
Total for Object			539500	PURCHASING CARD SUSPENSE								
25310	079	000	53105018.541200.		47662656	08/13/21	PV	V	AS - MATERIEL DIVISION	6439494		53.95
Total for Object			541200	PURCHASING ASSESSMENT								53.95
25310	079	000	53105018.547100.		47577529	08/01/21	P9	V	AS - PERSONNEL DIVISION	6421421		11.40
Total for Object			547100	EDUCATIONAL SERVICES								11.40
25310	079	000	53105018.554900.		47577523	08/01/21	P9	V	PATROL, NEBRASKA STATE	6421409		226.25
Total for Object			554900	OTHER CONTRACTUAL SERVICES								226.25
25310	079	000	53105018.571100.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		72.85
25310	079	000	53105018.571100.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		10.45-
Total for Object			571100	LODGING								62.40
25310	079	000	53105018.571800.		47591868	08/01/21	PV	V	DOWNING, BONNIE M	6422842		

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Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
Total for Object			571800	MEALS - TRAVEL STATUS								37.54
25310	079	000	53105018.574500.		47577588	08/01/21	P9	V	MUSTOE, CHRISTOPHER M	6421457		77.95
25310	079	000	53105018.574500.		47577597	08/01/21	PV	V	MUSTOE, CHRISTOPHER M	6421475		42.22
25310	079	000	53105018.574500.		47591859	08/01/21	PV	V	WALKENHORST, WADE	6422834		4.37
25310	079	000	53105018.574500.		47591868	08/01/21	PV	V	DOWNING, BONNIE M	6422842		178.36
Total for Object			574500	PERSONAL VEHICLE MILEAGE								302.90
25310	079	000	53105018.575100.		47577588	08/01/21	P9	V	MUSTOE, CHRISTOPHER M	6421457		4.50
25310	079	000	53105018.575100.		47577597	08/01/21	PV	V	MUSTOE, CHRISTOPHER M	6421475		2.44
25310	079	000	53105018.575100.		47591859	08/01/21	PV	V	WALKENHORST, WADE	6422834		1.62
25310	079	000	53105018.575100.		47591868	08/01/21	PV	V	DOWNING, BONNIE M	6422842		7.31
Total for Object			575100	MISC TRAVEL EXPENSE								15.87
Total for Business Unit			53105018	NE REAL PROPERTY APPRAISER								2,011.49
25320	079	000	53105200.475163.		16418324	08/01/21	JE	G	NRPAB JE CORRECT AMC DEPOSIT	6425062		4,500.00
25320	079	000	53105200.475163.		402295	08/10/21	RC	RB	NRPAB AMC DEPOSIT 210810	6433541		2,000.00-
Total for Object			475163	AMC REGISTERED NEW FEES								2,500.00
25320	079	000	53105200.475165.		400958	08/02/21	RC	RB	NRPAB AMC DEPOSIT 210802	6425055		1,500.00-
25320	079	000	53105200.475165.		16418324	08/01/21	JE	G	NRPAB JE CORRECT AMC DEPOSIT	6425062		4,500.00-
25320	079	000	53105200.475165.		401065	08/03/21	RC	RB	NRPAB AMC DEPOSIT 210803	6426094		1,500.00-
25320	079	000	53105200.475165.		403676	08/18/21	RC	RB	NRPAB AMC DEPOSIT 210818	6442087		1,500.00-
25320	079	000	53105200.475165.		404834	08/26/21	RC	RB	NRPAB AMC DEPOSIT 210826	6450987		1,500.00-
Total for Object			475165	AMC REGISTERED RENEWAL								10,500.00-
25320	079	000	53105200.481100.		16561135	08/25/21	JE	G	OIP July 2021 1.33407%	6450553		357.69-
Total for Object			481100	INVESTMENT INCOME								357.69-
25320	079	000	53105200.511100.		3158704	08/11/21	T2	7	PAYROLL LABOR DISTRIBUTION	6426909		1,780.24
25320	079	000	53105200.511100.		3158971	08/25/21	T2	7	PAYROLL LABOR DISTRIBUTION	6443153		2,069.62
Total for Object			511100	PERMANENT SALARIES-WAGES								3,849.86
25320	079	000	53105200.512100.		3158704	08/11/21	T2	7	PAYROLL LABOR DISTRIBUTION	6426909		415.13
25320	079	000	53105200.512100.		3158971	08/25/21	T2	7	PAYROLL LABOR DISTRIBUTION	6443153		125.76
Total for Object			512100	VACATION LEAVE EXPENSE								540.89
25320	079	000	53105200.515100.		3158705	08/11/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6426909		154.88

Agency 053 REAL PROPERTY APPRAISER BD
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 Grant

STATE OF NEBRASKA
 MTD General Ledger Detail
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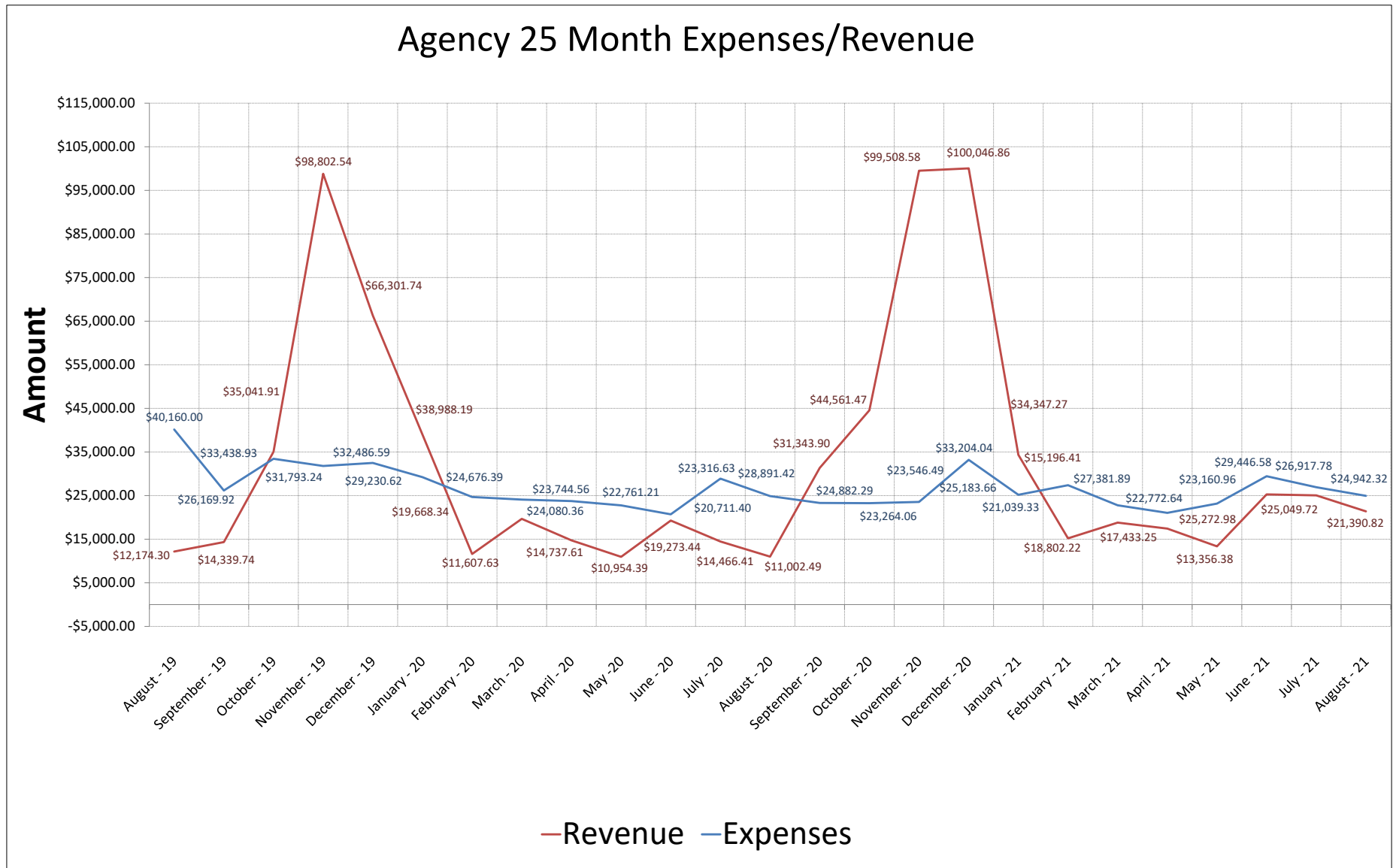
Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25320	079	000	53105200.515100.		3158972	08/25/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6443153		164.38
Total for Object			515100 RETIREMENT PLANS EXPENSE									328.76
25320	079	000	53105200.515200.		3158705	08/11/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6426909		152.32
25320	079	000	53105200.515200.		3158972	08/25/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6443153		152.31
Total for Object			515200 FICA EXPENSE									304.63
25320	079	000	53105200.515500.		3158705	08/11/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6426909		479.82
25320	079	000	53105200.515500.		3158972	08/25/21	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	6443153		479.83
Total for Object			515500 HEALTH INSURANCE EXPENSE									959.65
25320	079	000	53105200.516500.		47591875	08/01/21	PV	V	AS - RISK MANAGEMENT DIVISION	6422855		534.80
Total for Object			516500 WORKERS COMP PREMIUMS									534.80
25320	079	000	53105200.521100.		16550043	08/23/21	JE	G	NRPAB POSTAGE JULY 2021	6448092		107.05
Total for Object			521100 POSTAGE EXPENSE									107.05
25320	079	000	53105200.521400.		47577516	08/01/21	PV	V	AS - OCIO - COMMUNICATIONS	6421389		59.61
25320	079	000	53105200.521400.		47640442	08/09/21	PV	V	AS - OCIO - IMSERVICES	6433978		1,142.66
Total for Object			521400 CIO CHARGES									1,202.27
25320	079	000	53105200.521500.		47640430	08/09/21	PV	V	LINCOLN JOURNAL STAR - PAYMENT	6433968		13.45
25320	079	000	53105200.521500.		16550042	08/23/21	JE	G	NRPAB COPY SERV APR-JUN 2021	6448084		164.64
Total for Object			521500 PUBLICATION & PRINT EXP									178.09
25320	079	000	53105200.522200.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		180.25
Total for Object			522200 CONFERENCE REGISTRATION									180.25
25320	079	000	53105200.524600.		16401459	08/01/21	JE	G	NRPAB RENT JUL 2021	6421313		328.98
25320	079	000	53105200.524600.		16497156	08/13/21	JE	G	NRPAB RENT AUG 2021	6439133		328.98
25320	079	000	53105200.524600.		47662693	08/13/21	PV	V	SECRETARY OF STATE	6439501		12.67
Total for Object			524600 RENT EXPENSE-BUILDINGS									670.63
25320	079	000	53105200.524900.		16401459	08/01/21	JE	G	NRPAB RENT JUL 2021	6421313		112.56
25320	079	000	53105200.524900.		16497156	08/13/21	JE	G	NRPAB RENT AUG 2021	6439133		112.56
Total for Object			524900 RENT EXP-DEPR SURCHARGE									225.12
25320	079	000	53105200.541200.		47662656	08/13/21	PV	V	AS - MATERIEL DIVISION	6439494		29.05
Total for Object			541200 PURCHASING ASSESSMENT									29.05

Agency 053 REAL PROPERTY APPRAISER BD
 Division 000 AGENCY DEFINED DIVISION
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STATE OF NEBRASKA
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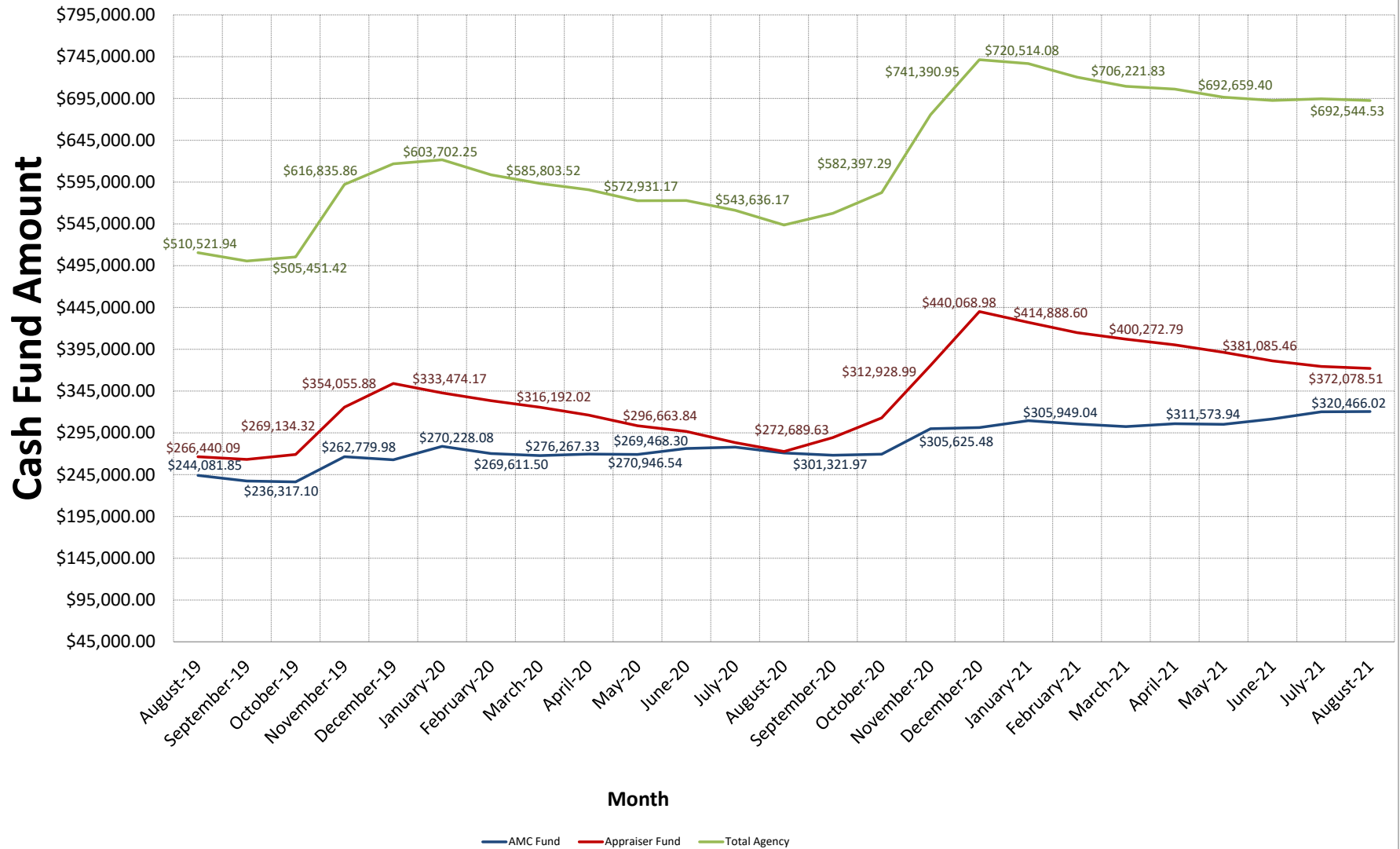
Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25320	079	000	53105200.547100.		47577529	08/01/21	P9	V	AS - PERSONNEL DIVISION	6421421		7.60
Total for Object			547100 EDUCATIONAL SERVICES									7.60
25320	079	000	53105200.554900.		47577523	08/01/21	P9	V	PATROL, NEBRASKA STATE	6421409		543.00
Total for Object			554900 OTHER CONTRACTUAL SERVICES									543.00
25320	079	000	53105200.571100.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		39.22
25320	079	000	53105200.571100.		16423563	08/03/21	J1	G	PURCHASE CARD TRANSACTION	6427098		5.62-
Total for Object			571100 LODGING									33.60
25320	079	000	53105200.571800.		47591868	08/01/21	PV	V	DOWNING, BONNIE M	6422842		20.22
Total for Object			571800 MEALS - TRAVEL STATUS									20.22
25320	079	000	53105200.574500.		47577588	08/01/21	P9	V	MUSTOE, CHRISTOPHER M	6421457		51.97
25320	079	000	53105200.574500.		47577597	08/01/21	PV	V	MUSTOE, CHRISTOPHER M	6421475		22.74
25320	079	000	53105200.574500.		47591859	08/01/21	PV	V	WALKENHORST, WADE	6422834		2.35
25320	079	000	53105200.574500.		47591868	08/01/21	PV	V	DOWNING, BONNIE M	6422842		96.04
Total for Object			574500 PERSONAL VEHICLE MILEAGE									173.10
25320	079	000	53105200.575100.		47577588	08/01/21	P9	V	MUSTOE, CHRISTOPHER M	6421457		3.00
25320	079	000	53105200.575100.		47577597	08/01/21	PV	V	MUSTOE, CHRISTOPHER M	6421475		1.31
25320	079	000	53105200.575100.		47591859	08/01/21	PV	V	WALKENHORST, WADE	6422834		.88
25320	079	000	53105200.575100.		47591868	08/01/21	PV	V	DOWNING, BONNIE M	6422842		3.94
Total for Object			575100 MISC TRAVEL EXPENSE									9.13
Total for Business Unit		53105200	AMC LICENSING									1,540.01
Total for Division		000										3,551.50
Total for Agency		053	REAL PROPERTY APPRAISER BD									3,551.50

Real Property Appraiser Board Financial Report

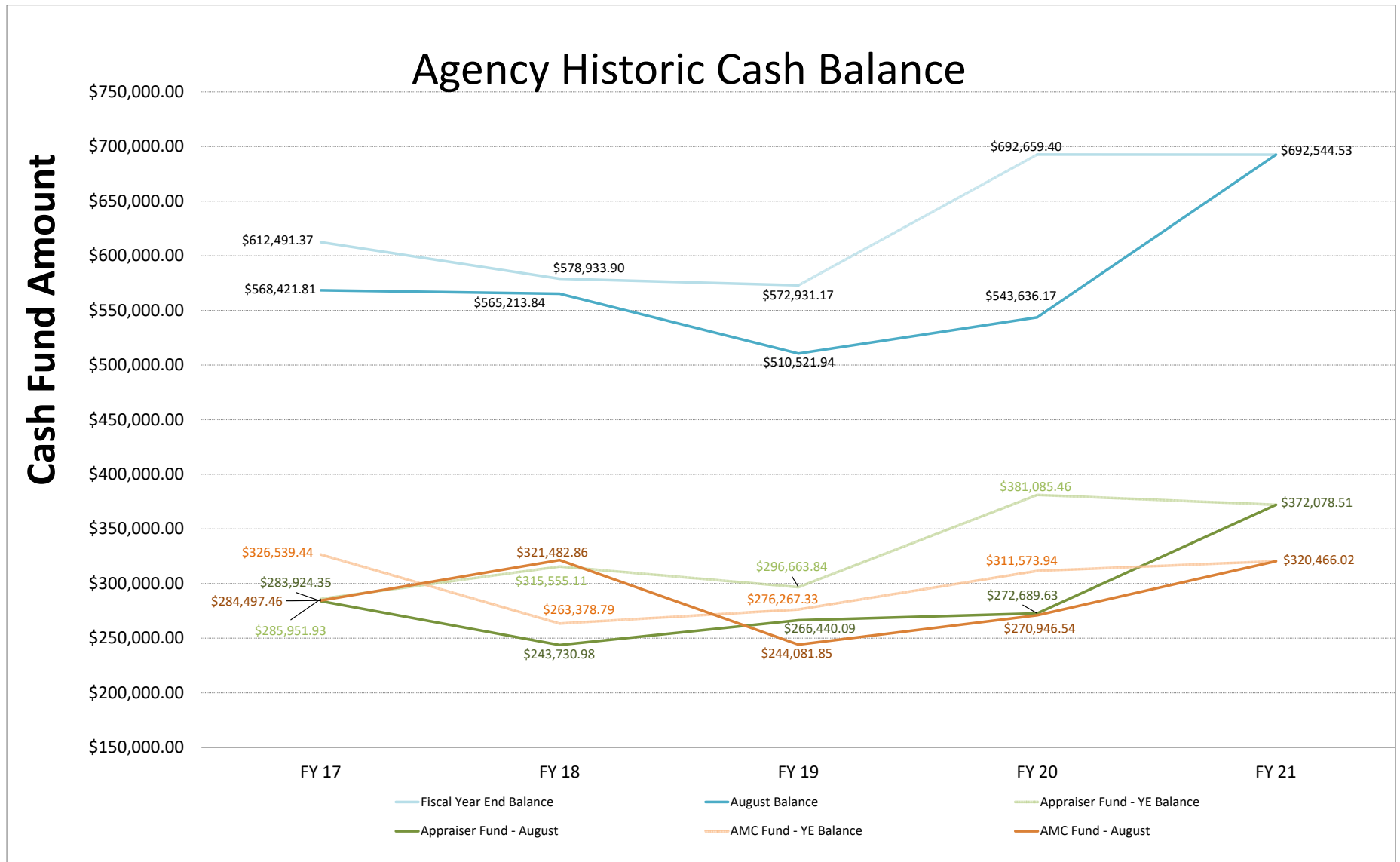


Real Property Appraiser Board Financial Report

Agency 25 Month Cash Balance



Real Property Appraiser Board Financial Report



Owl Labs Meeting Owl Pro - 360-Degree, 1080p HD Smart Video Conference Camera, Microphone, and Speaker (Automatic Speaker Focus & Smart Zooming and Noise Equalizing) - 1920 x 1080 Video - Auto-focus - Microphone - Wireless LAN - Computer

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1080p camera

Tri-speaker



IDEAL FOR LARGER ROOMS

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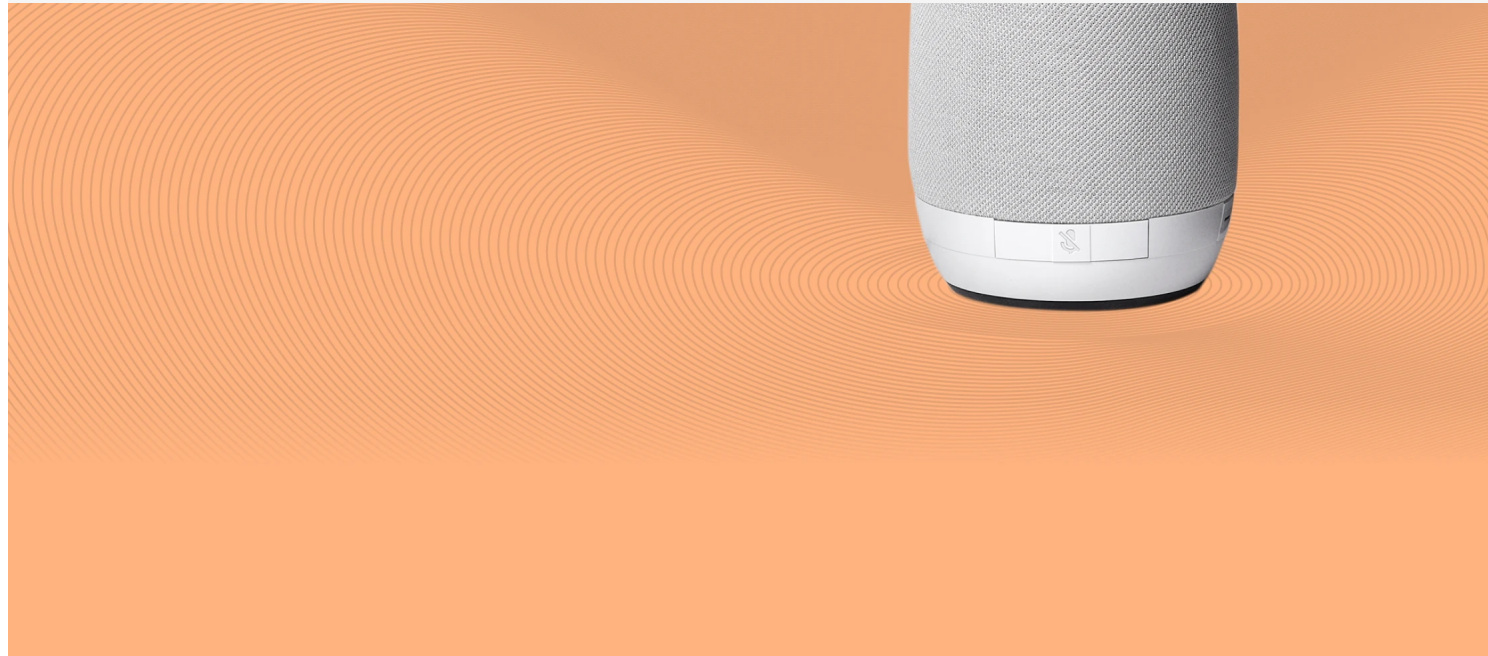
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Overview

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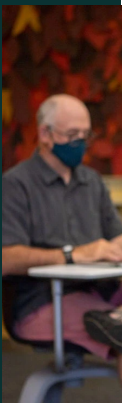
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Overview

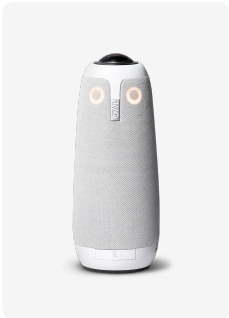
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Hoots and Hollers

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Memo from the Board to Nebraska Real Property Appraisers

September 17, 2021

STATE OF NEBRASKA ACCEPTING APPLICATIONS FOR NEW 2ND CONGRESSIONAL DISTRICT CERTIFIED REAL PROPERTY APPRAISER MEMBER ON NRPAB

By Tyler Kohtz, Director

Board Member Christopher M.A. Mustoe's term as the 2nd congressional district certified real property appraiser representative on the Nebraska Real Property Appraiser Board expires on December 31, 2021. The State of Nebraska is currently accepting applications to fill this position.

The Board administers and enforces the Nebraska Real Property Appraiser Act and Nebraska Appraisal Management Company Registration Act, to ensure that the citizens of Nebraska are protected and served, and also that the appraisal services community is highly qualified through education, experience, and examination.

The Board's primary functions include issuing and renewing appraiser credentials, developing and implementing appraiser standards, approving and renewing registration for appraisal management companies, approving appraiser qualifying courses and continuing education activities, investigating and adjudicating grievances, developing laws and rules, and disseminating relevant information to general public, stakeholders, credentialed appraisers and appraisal management companies.

Anyone interested in the position as the 2nd congressional district certified real property appraiser representative must hold a current certified real property appraiser credential, and must currently reside in the 2nd congressional district (green area of map). The term for this position will run for five years, beginning on January 1, 2022. If you would like more information about this position, or what the Board does, please visit the NRPAB website at appraiser.ne.gov or contact the Board's office at 402-471-9015.

Board Members

Chairperson of the Board

Christopher M.A. Mustoe, Omaha
Certified General Appraiser
2nd District Representative
Term Expires: January 1, 2022

Vice-Chairperson of the Board

Thomas M. Luhrs, Imperial
Certified General Appraiser
Licensed Real Estate Broker Rep
Term Expires: January 1, 2023

Board Member

Wade Walkenhorst, Lincoln
Financial Institutions Rep
Term Expires: January 1, 2024

Board Member

Bonnie M. Downing, Dunning
Certified General Appraiser
3rd District Representative
Term Expires: January 1, 2025

Board Member

Cody Gerdes, Lincoln
Certified General Appraiser
1st District Representative
Term Expires: January 1, 2026



Tyler N. Kohtz, Director

301 Centennial Mall South, First Floor
PO Box 94963
Lincoln, NE 68509-4963

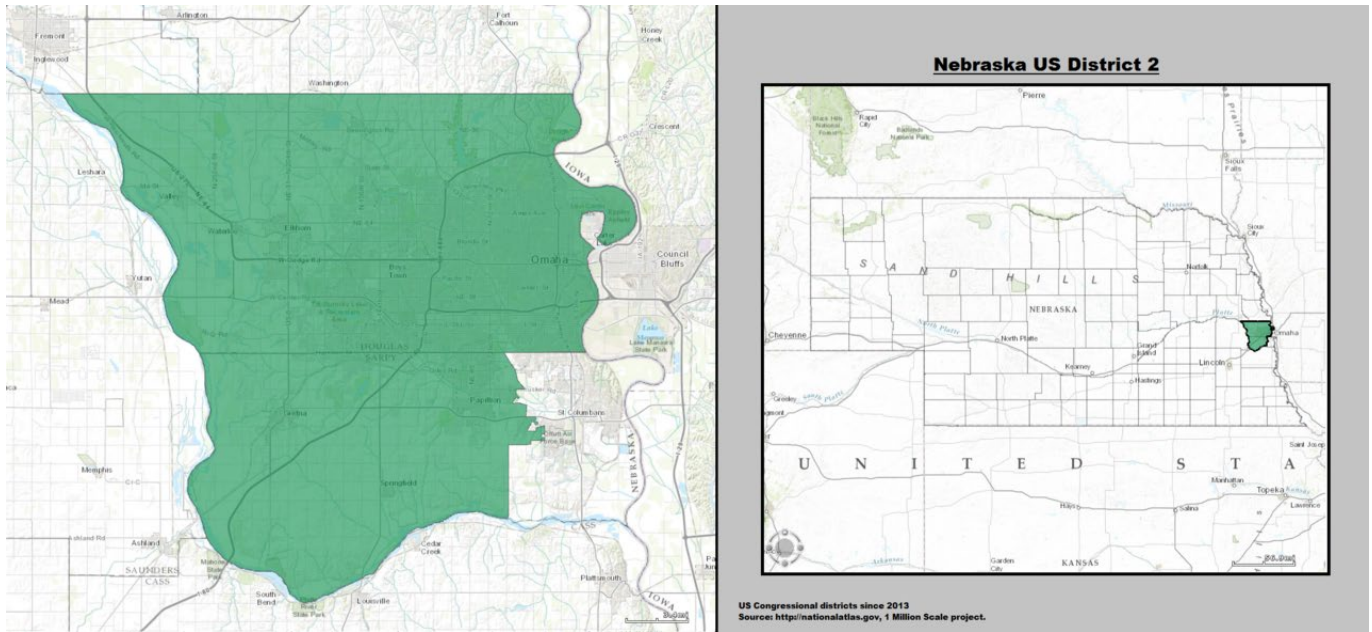
Phone: 402-471-9015

Fax: 402-471-9017

Website: <https://appraiser.ne.gov>



Visit NRPAB on Facebook



The application can be found on the Governor’s website located at governor.nebraska.gov. Select the dropdown titled “Constituent Services” at the top of the page, then select “Boards and Commissions.” The Board hopes to have a new member appointed prior to its January meeting, so if interested, please complete the application before December 1, 2021.



THE NEBRASKA APPRAISER

News from the Nebraska Real Property Appraiser Board

Summer 2021

Director's Comments



Director Tyler Kohtz

Tyler Kohtz has been the Director for the Nebraska Real Property Appraiser Board since March of 2012. He is responsible for the development, implementation, and management of all programs for the agency, including the administration and enforcement of the Real Property Appraiser Act and the Appraisal Management Company Registration Act.

Behind the Scenes

Allison Nespor has been with the Board for over five years, and Katja Duerig has been with the Board for almost three years. Many of you have experienced the hard work and dedication that defines them. The heartbeat is an involuntary muscle function of the human body; these two operate much the same way for the Board. Just as the heart beats all day, everyday, these two carry out the day-to-day management of the Board's programs effectively and efficiently. If you happen to cross paths with either one, please let them know how appreciated they are. The Board also held its strategic planning meeting in June. At this meeting the Board establishes its short-term and long-term goals and objectives for the future. I always refer to the purpose of this meeting as laying the road map for the next fiscal year. The Board's hard work and dedication during this meeting is appreciated. If you happen to cross paths with a member of the Board, please thank them for their hard work as well. You can find additional information about the strategic planning meeting and much more in this edition of The Nebraska Appraiser.

In This Issue

NRPAB Feature:

- 2022-2023 Credential Renewal Processes and Procedures

NRPAB Quick Hits:

- 2021 NRPAB Strategic Planning Summary
- Employee Anniversaries
- Guidance Documents Adopted/Retired Between April and June of 2021
- Compliance Update (April — June 2021)

Coming and Going:

- Who's New? (April – June)
- Real Property Appraiser and AMC Numbers and Trends as of July 1, 2021
- Real Property Appraiser Credential Renewal Report as of July 1, 2021

Financial Snapshot:

- June 30, 2021 Financial Report

Upcoming NRPAB Meetings:

- ◆ October 21, 2021 @ NRPAB Office (Conference Room)
- ◆ November 18, 2021 @ NRPAB Office (Conference Room)
- ◆ December 16, 2021 @ NRPAB Office (Conference Room)

* These meeting dates are all tentative. Please check the Board's Facebook page for information as these dates approach. The start time for each meeting can be found on the agenda posted to the Board's website at least 48 hours prior to the start of the meeting.

2022-23 Credential Renewal Processes and Procedures

By Tyler N. Kohtz, Director

Real property appraiser renewal applications are due November 30, 2021. If your Nebraska credential expires December 31, 2021, please review the following information regarding the 2022-23 credential renewal process.

Yellow postcards were mailed in late June to all real property appraisers whose credentials expire December 31, 2021, with directions for downloading the paper real property appraiser renewal application form from the Board's website at appraiser.ne.gov (see yellow highlights in picture at bottom of this page), and how to access the online real property appraiser renewal application through Appraiser Login via Centurion (see yellow highlights in picture at bottom of this page and red highlights in picture at bottom of the next page). Additional information related to logging into Appraiser Login through Centurion, and for updating contact information and completing the online real property appraiser renewal application can be found in the Winter 2021 edition of The Nebraska Appraiser feature article titled "NRPAB Appraiser Login Expanded to Include Online Real Property Appraiser Renewal Application and Contact Information Self-Service Interface," which is located on the Board's website at: https://appraiser.ne.gov/newsletters_and_memos/2021/TheNebraskaAppraiserWinter2021.pdf.

If you have any questions regarding Appraiser Login, the online real property appraiser renewal application, or the contact information interface, please feel free to contact the Board's office by phone at 402-471-9015, or by email at nrpab.AppraiserLogin@nebraska.gov.

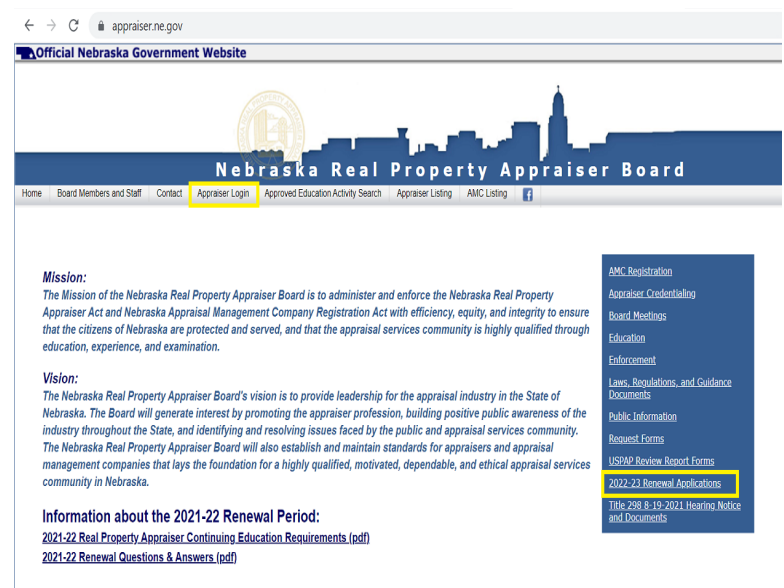
All online real property appraiser renewal applications must be submitted with a date stamp prior to December 1, 2021, and all paper real property appraiser renewal applications, along with all required documents, must be mailed to the Board's office, postmarked prior to December 1, 2021, to be considered timely. Paper renewal applications must include:

- A completed 2022-23 Application for Renewal of Nebraska Real Property Appraiser Credential;

- Explanations and copies of documents for all "YES" answers to disciplinary questions;
- All fees;
- All required continuing education completion certificates and supporting documentation (if not already submitted to and approved by the NRPAB through the Education Submission Portal found in Appraiser Login or by email); and
- For those notified of random selection by certified mail, the signed and dated Authorization to Use Fingerprints for Criminal History Record Check Through the Nebraska State Patrol and the Federal Bureau of Investigation form and fingerprint cards or date of electronic fingerprint submission.

(Note: You must include all required documentation and explanations of "YES" answers to disciplinary questions with each renewal application, even if that information was previously sent to the Board.)

Incomplete or incorrect paper real property appraiser renewal applications will be returned, and incomplete online real property appraiser renewal applications will be rejected. In these cases a letter describing the issues and explaining the next step will be sent (the status of an online real property appraiser renewal application can also be followed in Appraiser Login). Applications missing any required accompanying documentation are considered incomplete.



2022-23 Credential Renewal Processes and Procedures (Continued)

When a complete real property appraiser renewal application has been received and processed by board staff, a blue postcard will be mailed stating that the credential has been renewed and providing directions for printing the credentialing card through Appraiser Login. An automated email will also be sent.

If a completed online real property appraiser renewal application is not submitted with a date stamp prior to December 1, 2021, or a paper real property appraiser renewal application, along with all required documents, is not received at the Board's office postmarked prior to December 1, 2021, a credential holder will have until July 1, 2022 to meet the requirements for renewal. A late processing fee of \$25.00 will be assessed for each month or portion of a month the credential is not renewed beginning on December 1, 2021. (The late processing fee does not apply until January 1, 2022 for new or upgraded credentials issued on or after November 1, 2021.)

Except for applications to renew new or upgraded credentials issued after November 30, 2021 and before January 1, 2022, all real property appraiser renewal applications received after November 30, 2021 may go before the Board for review.

If an appraiser who is required to submit fingerprints with this year's real property appraiser renewal application sends everything on time (on or before November 30, 2021), but the Board has not received the criminal history record check ("CHRC") results from the State Patrol by December 31, 2021, the Board may renew a credential contingent on the CHRC results. All other requirements for renewal must be met prior to the November 30 deadline for this contingent approval.

A credential holder may elect inactive status to maintain his or her credential if he or she is unable to engage in real property appraisal practice for a period of less than two years. The inactive status application is located on the Board's website at: https://appraiser.ne.gov/Appraiser_Credentialing/.

Information regarding the CE requirements is available in Appraiser Login in the Education Interface ("Education" button on the left side of the page - see red highlights in picture at bottom of the page). Log into Appraiser Login and select the "Nebraska Real Property Appraiser Continuing Education Requirements" link at the top of the page in the Education Interface.

The Board may adopt a program of continuing education for an individual credential holder as long as the program complies with the Appraiser Qualifications Board's continuing education criteria. To request an individualized program of continuing education, submit a letter to the Board explaining the circumstances that are the basis for the request and the reason(s) why the existing continuing education requirements are a hardship.

Each credential holder who successfully renews his or her credential after the second year of a two-year credential period receives one free download of the PDF version of the 2020-21 Edition of USPAP through Appraiser Login ("USPAP" button on the left side of the page - see red highlights in picture at bottom of this page). The PDF version may only be used in accordance with the License Agreement for TAF Digital Content once the download is complete. You can purchase a hard copy from [The Appraisal Foundation](https://www.theappraisalfoundation.org/).

Please contact the Board's office at 402-471-9015, or by email at: nrpab.renewals@nebraska.gov, for any questions concerning continuing education requirements or the real property appraiser renewal process.



NRPAB Quick Hits:

2021 NRPAB Strategic Planning Meeting Summary

The Board held its strategic planning meeting on June 16, 2021. At this meeting the Board discussed the previous fiscal year and established its short-term and long-term goals and objectives for the future.

As accomplishments for the 2020-2021 fiscal year, the Board included staying on top of federal and industry changes and adjustments during the Covid-19 pandemic; adoption of changes to Title 298 to address previous law changes and issues faced by the Board; successful completion an APA audit on the Board's programs that ended with no findings in the attestation report; completion of all priority tasks established during the last strategic planning in 2019; implementation of COVID-19 operating procedures that were mindful of staff and Board safety with no disruption in services to the public; completion of the online appraiser renewal application project; easing renewal requirements, particularly for credential holders who reside in another jurisdiction, through lawmaking and rules updates; development and implementation of procedures to accept online continuing education completed in another jurisdiction; completion of one full renewal cycle with the online education submission portal; making significant progress in the transfer of physical files to an electronic file format; and obtaining critical funding for the 2021-2023 Biennium as requested.

The Board also had many productive discussions concerning the future and the goals and objectives for the 2021-2022 fiscal year. The Board's short-term goals and objectives include working with the Banking, Commerce and Insurance Legislative Committee's Legal Counsel to draft a bill to be introduced addressing the changes needed in the Real Property Appraiser Act, including but not limited to the incorporation of PAREA as an alternative to real property appraisal practice experience, removing the limitation that a real property appraiser cannot represent him or herself as a property owner for property tax purposes, and removing the engagement letter completion date requirement for issuance of a temporary real property appraiser credential; adopting Title 298 changes to reduce unnecessary regulatory burden and remove barriers to entry into the real property appraiser profession, provide for better clarification and administration, and harmonize Title 298 with the changes made to the Nebraska Real Property Appraiser Act through LB808 in 2020 and LB23 in 2021; exploring development of a supervisory real property appraiser eligibility list derived from a question on the Application for Renewal of Nebraska Real Property Appraiser Credential; exploring change to testing service provider; and limiting the disciplinary action reporting requirement to a set number of years based on reasonableness on the applications for credentialing.



NRPAB Quick Hits:

2021 NRPAB Strategic Planning Meeting Summary

The Board's long-term goals and objectives include addressing real property appraiser industry changes made at the federal level as needed; harmonizing Title 298 with the changes made to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act as needed; continuing to monitor the effectiveness of regulations; continuing to adopt Guidance Documents for public advisement concerning interpretation of statutes and rules and retiring Guidance Documents that are no longer relevant; continuing to adopt internal procedures as needed to assist with the Board's administration of its programs and retire internal procedures that are no longer relevant; continuing to monitor the effectiveness and efficiency of the compliance program; exploring opportunities to increase the number of Nebraska resident real property appraisers; and continuing to update the policies and procedures documents as needed to ensure compliance with state policy changes and to address general work environment needs and/or changes.

More information on the Board's 2021 strategic planning meeting can be found in the June 16, 2021 meeting minutes located on the Board's website at: <https://appraiser.ne.gov/meetings/minutes/index.html>.

NRPAB Staff

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BUSINESS AND EDUCATION PROGRAM MANAGER

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Lincoln, NE 68509-4963

Phone: 402-471-9015
Fax: 402-471-9017
Website: <https://appraiser.ne.gov/>



[Visit NRPAB on Facebook](#)

Have questions? We have answers!

Questions related to appraisal management company registration and renewal: nrpab.amc@nebraska.gov

Questions related to real property appraiser credentialing: nrpab.credentialing@nebraska.gov

Questions related to real property appraiser credential renewal: nrpab.renewals@nebraska.gov

Questions related to real property appraiser education (QE & CE): nrpab.education@nebraska.gov

Questions related to investigations, or how to file a grievance: nrpab.compliance@nebraska.gov

Questions related to Appraiser Login: nrpab.AppraiserLogin@nebraska.gov

General Questions: nrpab.questions@nebraska.gov

NRPAB Quick Hits:

- ◆ Congratulations to Allison Nespor, who has been with the Board for five years as of July 18th.
- ◆ The Nebraska Real Property Appraiser Board retired no guidance documents and adopted no guidance documents between April and June. All Guidance Documents are available for viewing on the Board's website at: https://appraiser.ne.gov/guidance_documents.html.
- ◆ Compliance Update
 - * Between the months of April and June, there were two grievances filed against Nebraska credentialed real property appraisers, and the Board dismissed two grievances without prejudice. No disciplinary actions were taken by the Board against any appraisers during this period.
 - * Between the months of April and June, no grievances were filed against any appraisal management companies. During this time, no disciplinary actions were taken by the Board against any appraisal management companies.



Chairperson of the Board
Christopher M.A. Mustoe, Omaha
Certified General Appraiser
2nd District Representative
Term Expires: January 1, 2022

Vice Chairperson of the Board
Thomas M. Luhrs, Imperial
Certified General Appraiser
Licensed Real Estate Broker Rep
Term Expires: January 1, 2023

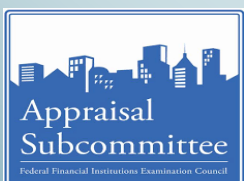
Board Member
Wade Walkenhorst, Lincoln
Financial Institutions Rep
Term Expires: January 1, 2024

Board Member
Bonnie M. Downing, Dunning
Certified General Appraiser
3rd District Representative
Term Expires: January 1, 2025

Board Member
Cody Gerdes, Lincoln
Certified General Appraiser
1st District Representative
Term Expires: January 1, 2026



What's new at The Appraisal Foundation?
appraisalfoundation.org



What's new at the Appraisal Subcommittee?
asc.gov



What's new at the AARO?
aaro.net

Who's New?

The Nebraska Real Property Appraiser Board congratulates the following individuals who received real property appraiser credentials, and the organizations newly registered as appraisal management companies, between April and June of 2021.

Trainee Real Property Appraisers

Samantha Robb, Boys Town NE – T2021013
Freedom Terpstra, Omaha NE - T2021014
Scott Lamb, Omaha NE – T2021015
Kirsten Wisniewski, Minneapolis MN – T2021016
Jason Archer, Lincoln NE – T2021017
Pamela Stewart, Syracuse NE – T2021018
Rebecca Mathine, Omaha NE – T2021019

Certified Residential Real Property Appraisers

Bruce Fitzsimons, Castle Rock CO – CR2021004R

Certified General Real Property Appraisers

Collin Freeman, Norfolk NE – CG202106
Neal Hilston, Casper WY – CG2021007R
William Lundquist, Loveland CO – CG2021008R
Joseph Sloan, Georgetown TX – CG2021009R
Clark De Vries, Yankton SD – CG2021010R

Appraisal Management Companies

Suntender Valuations, Inc – NE2021001
Accelerated Appraisal Management Company LLC – NE2021002
E Street Appraisal Management LLC – NE2021003
Nadlan Valuation Inc – NE2021004

Free Voluntary Guidance for Appraisers

Looking for guidance on recognized valuation methods and techniques? The Appraisal Foundation has issued *Valuation Advisories*, which are available for free on the Foundation's web site. The following *Valuation Advisories* are currently available:

APB Valuation Advisory #2:
[Adjusting Comparable Sales for Seller Concessions](#)

APB Valuation Advisory #3:
[Residential Appraising in a Declining Market](#)

APB Valuation Advisory #4:
[Identifying Comparable Properties – Revised](#)

APB Valuation Advisory #5:
[Identifying Comparable Properties in Automated Valuation Models for Mass Appraisal](#)

APB Valuation Advisory #6:
[Valuation of Green and High Performance Property: Background and Core Competency](#)

APB Valuation Advisory #7:
[Valuation of Green and High Performance Property: One- to Four-Unit Residential](#)

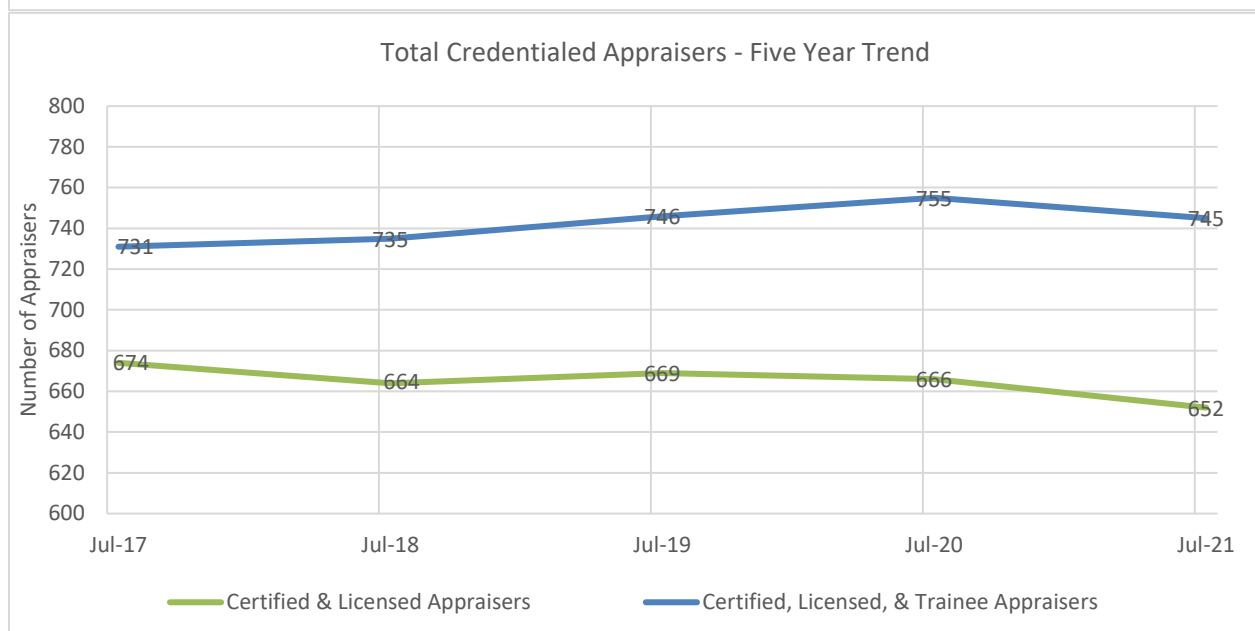
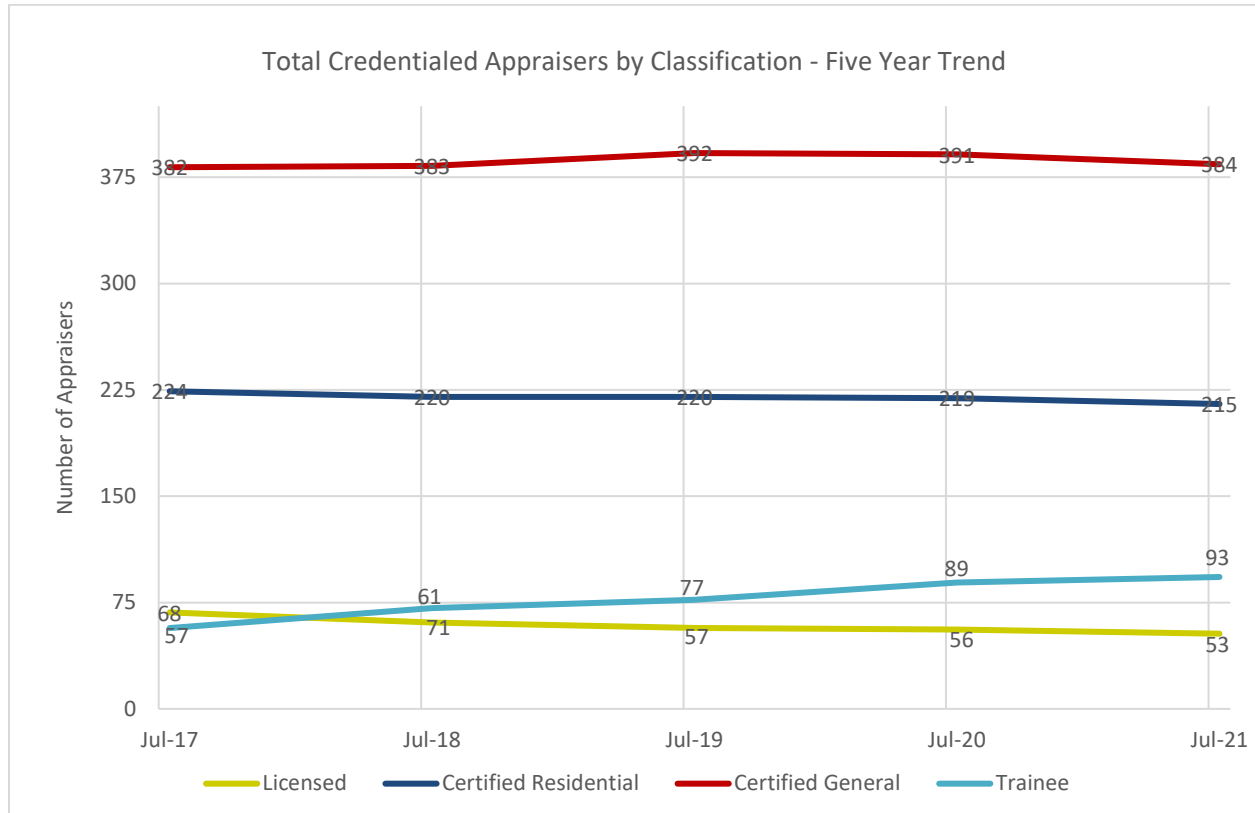
APB Valuation Advisory #8:
[Collection and Verification of Residential Data in the Sales Comparison Approach](#)

APB Valuation Advisory #9:
[Valuation of Green and High-Performance Property: Commercial, Multi-family, and Institutional Properties](#)

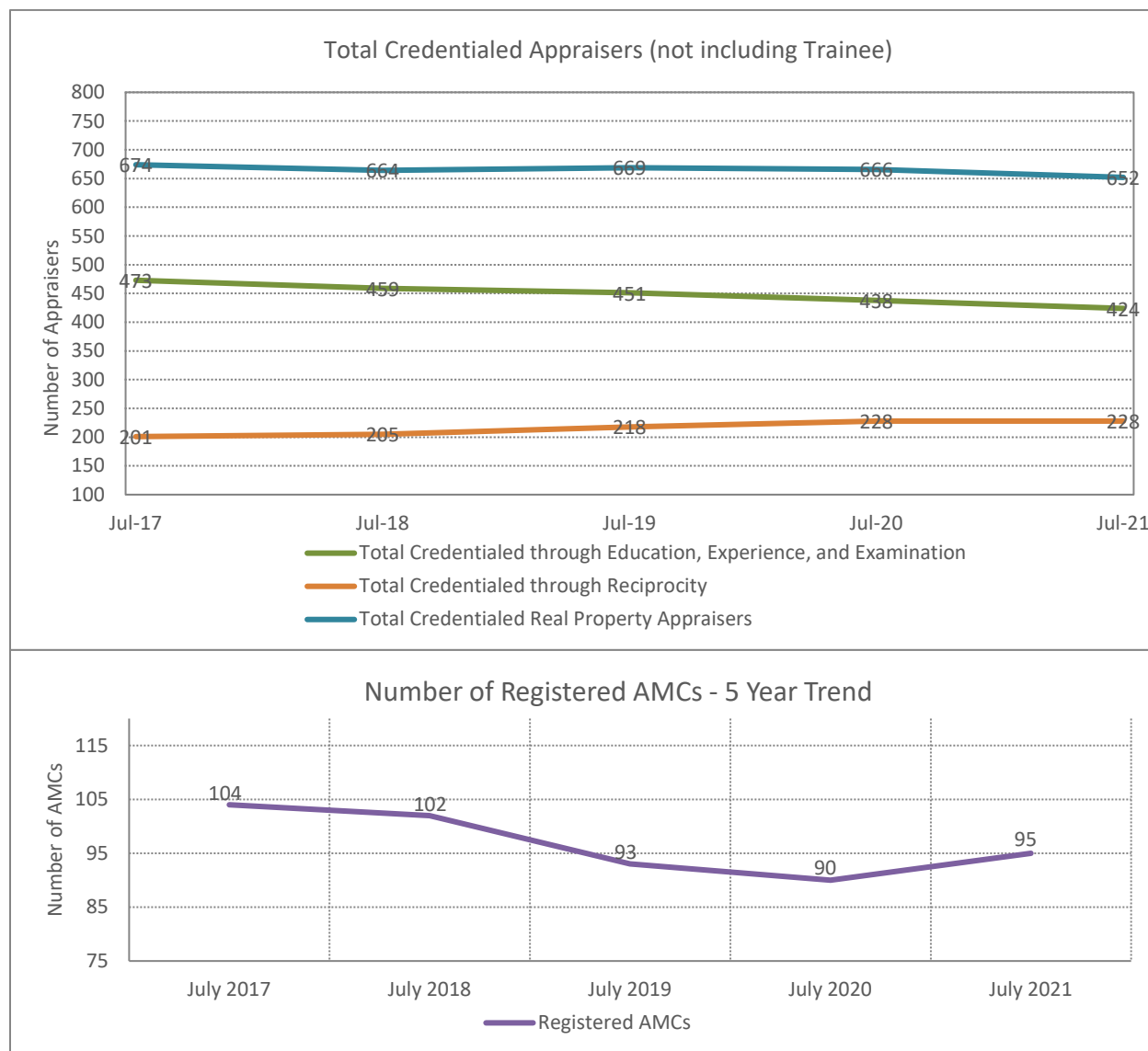
To learn more about the APB's *Valuation Advisories* and what advisories are under development, click [here](#).

Real Property Appraiser and AMC Numbers and Trends as of July 1, 2021

The charts below outline the five-year trend for the number of Nebraska credentialed real property appraisers and Nebraska registered appraisal management companies as of July 1, 2021. There are currently 652 licensed residential, certified residential, and certified general real property appraisers in Nebraska, and 93 credentialed trainee real property appraisers. In addition, there are currently 95 appraisal management companies registered in Nebraska.



Real Property Appraiser and AMC Numbers and Trends as of July 1, 2021 (Continued)



THE APPRAISAL FOUNDATION

Authorized by Congress as the Source of Appraisal Standards and Appraiser Qualifications



**The Appraisal Foundation
Q&A Forum**



Do you have a question for the Appraiser Qualifications Board or Appraisal Standards Board?

You can post your questions on appraisal standards or appraiser qualifications in the Q&A Forum and receive a timely answer from Foundation staff.

For more information on the Forum and how to register, please visit The Appraisal Foundation's Q&A webpage located at https://www.appraisalfoundation.org/imis/TAF/Resources/Current_Appraisers/Q_As/TAF/QAs.aspx?hkey=29db1bf8-827d-4f7b-b525-06ac9f596637.

To access the Forum directly, visit <https://appraisal.answerbase.com/>.

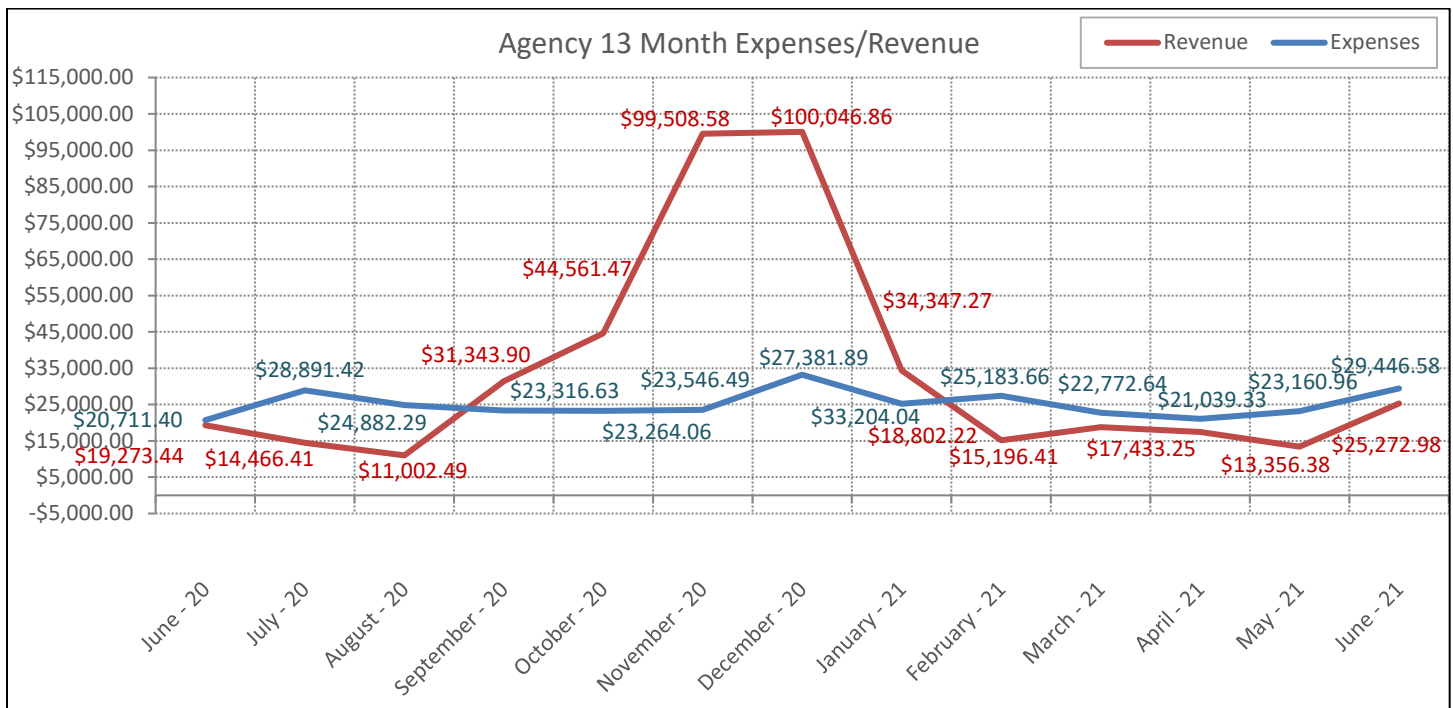
Real Property Appraiser Renewal Report as of July 1, 2021

The charts below outline the real property appraiser renewal counts and percentages as of July 1, 2021. There were 604 trainee, licensed residential, certified residential and certified general real property appraiser renewals due, and 557 credentials were renewed.



NRPAB Financial Snapshot as of June 30, 2021

The 2020-21 Fiscal Year ended with \$306,089.99 in expenditures and \$425,698.78 in receivables. As of the end of June, actual expenses registered at 71.30 percent of the budgeted expenditures; revenues finished at 111.78 percent of projected revenues for the fiscal year. The lower than expected expenditures is attributed to fewer grievances requiring the use of subject matter experts and the Board's Special Assistant Attorney General, fewer real property appraiser applicants requiring the use of appraisal review services, and reduced travel expenditures due to the Covid-19 pandemic. Revenues exceeded projections, highlighted by strong appraisal management company and appraiser renewal revenues. More details regarding the Board's fiscal year end can be found in the July 15, 2021 meeting minutes located on the Board's website at <https://appraiser.ne.gov/meetings/minutes/index.html>.



← → ↻ appraiser.ne.gov

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Official Nebraska Government Website

Nebraska Real Property Appraiser Board

Home Board Members and Staff Contact **Appraiser Login** Approved Education Activity Search Appraiser Listing AMC Listing


Mission:
The Mission of the Nebraska Real Property Appraiser Board is to administer and enforce the Nebraska Real Property Appraiser Act and Nebraska Appraisal Management Company Registration Act with efficiency, equity, and integrity to ensure that the citizens of Nebraska are protected and served, and that the appraisal services community is highly qualified through education, experience, and examination.

Vision:
The Nebraska Real Property Appraiser Board's vision is to provide leadership for the appraisal industry in the State of Nebraska. The Board will generate interest by promoting the appraiser profession, building positive public awareness of the industry throughout the State, and identifying and resolving issues faced by the public and appraisal services community. The Nebraska Real Property Appraiser Board will also establish and maintain standards for appraisers and appraisal management companies that lays the foundation for a highly qualified, motivated, dependable, and ethical appraisal services community in Nebraska.

Information about the 2021-22 Renewal Period:
[2021-22 Real Property Appraiser Continuing Education Requirements \(pdf\)](#)
[2021-22 Renewal Questions & Answers \(pdf\)](#)

AMC Registration
 Appraiser Credentialing
 Board Meetings
 Education
 Enforcement
 Laws, Regulations, and Guidance Documents
 Public Information
 Request Forms
 USPAP Review Report Forms
 2021-22 Renewal Applications
 COVID-19 Information
 2021 Legislation of NRPAB Interest

Your credentialing card, the Online Renewal Application with EFW Payment, the Education Submission Portal, continuing education requirements, education history, and USPAP download are all found in the Appraiser Login on the Board's website.



Appraisal Subcommittee
Federal Financial Institutions Examination Council

Welcome

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ASC Meeting

Wednesday November 17, 2021

An ASC Open Meeting is scheduled for 10:00 a.m. ET on Wednesday, November 17, 2021. The Meeting agenda will be posted approximately two weeks before the Meeting.

Persons wishing to address the ASC members at a regular meeting may submit a request to the Chairman no less than 2 weeks in advance of a regular meeting date detailing the nature of the request. Such participation by public attendees is entirely at the Chairman's discretion, and if granted, is subject to time limitation as specified by the Chairman.

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NEWSLETTER



Dear Tyler Kohtz,

A lingering story in the appraisal profession over the last eighteen months has been allegations of bias and discrimination in home appraisals. As I have said in past letters here, and readers overwhelmingly agree, there is no place for discrimination in the appraisal profession.

And we have been taking action. Our boards and the Special Committee on Diversity, Equity and Inclusion have **undertaken a number of projects** aimed at diversifying our profession and ensuring appraisers have the tools they need to protect the public trust.

We are also pleased to see that other organizations as well as the federal government are working on this difficult topic.

As the congressionally-authorized organization charged with maintaining the standards and qualifications of the appraisal profession, we are also a resource for government officials who are seeking to learn more about the appraisal process. We continuously engage with our counterparts in Congress about any pending legislation that might impact the appraisal profession and to provide educational resources about appraisals and our standards and qualifications.

Recently this work has also extended to agency officials involved in President Biden's Property Appraisal and Valuation Equity (PAVE) Taskforce. We have provided letters to U.S. Department of Housing and Urban Development Secretary Marcia Fudge and other officials outlining the current standards and qualifications in the appraisal profession and how we are continuing to take action to protect the public trust.

This outreach has led to important dialogues about the appraisal profession and resulted in new opportunities for The Appraisal Foundation to share the work of appraisers and the appraisal process with federal leaders. In fact, one of our Trustees, Leigh Lester, has now been asked by the Office of the Comptroller of the Currency to participate in a related roundtable representing The Appraisal Foundation. We look forward to seeing how this opportunity can continue to foster engagement with our federal counterparts.

We are committed to serving as an educational resource for government officials, regulators and the public alike, and working together with each of you, to preserve the public's trust in the appraisal profession.

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Providing resources for federal officials

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Updates from the AQB

Appraiser Talk

Upcoming Events

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October 23: [Board of Trustees Public Meeting](#)

October 28: [ASB Public Meeting](#)

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Sincerely,

Dave Bunton
President

Fall Meetings Go Virtual

Given the rise in coronavirus cases around the country, the Board of Trustees has decided to hold their October public meeting virtually. Stay tuned for more updates including a registration link.

In light of this decision, we will also be making the upcoming Industry Advisory Council and The Appraisal Foundation Advisory Council meetings virtual as well. If you are a member of either of these councils, keep an eye on your inbox for more information.

Updates from the ASB

The ASB has released the [First Exposure Draft](#) of proposed changes to the 2023 USPAP. [Public comment](#) is open until October 11th. You can also [join a webinar](#) on this exposure draft on September 2nd.

Updates from the AQB

The AQB has adopted a new edition of the Real Property Appraiser Qualification Criteria. Click [here](#) to read more about the changes adopted in this version.

Thank you to everyone who submitted comments on the exposure drafts!

Appraiser Talk

The Appraisal Foundation's podcast Appraiser Talk releases it's newest episode every Monday.

You can check out a full list of published podcasts and listen to each episode [here](#). Click [here](#) to sign up to receive a notification each time a new episode is published.

You can subscribe to Appraiser Talk on Spotify, Apple Podcasts or wherever you get your podcasts. If you have a question you'd like to hear answered on the show, email it to Amy Timmerman at amy@appraisalfoundation.org.

About The Appraisal Foundation

The Appraisal Foundation is the nation's foremost authority on the valuation profession. The organization sets the Congressionally authorized standards and qualifications for real estate appraisers, and provides voluntary guidance on recognized valuation methods and techniques for all valuation professionals. This work advances the profession by ensuring appraisals are independent, consistent, and objective. More

PRESS RELEASE



BREAKING: AQB Adopts Changes to Real Property Appraiser Qualification Criteria

(Washington, DC) August 24, 2021 – The Appraiser Qualifications Board (AQB) today adopted a new edition of the *Real Property Appraiser Qualification Criteria (Criteria)*. The *Criteria* set qualification standards for real property appraisers in the United States and provide continuing education guidelines for current appraisers to maintain their appraisal license.

“The pandemic forced everyone to be flexible,” said AQB Chair Mark Lewis. “And the AQB was no exception. We temporarily allowed education which was approved for in-person learning to be converted to online synchronous courses to respond to lockdowns and stay at home orders. Over time, the AQB saw a tremendous response from appraisers who were able to take advantage of this new educational opportunity. The AQB is responding to that feedback by making these temporary changes permanent.”

Among the updates included in the newest edition of the *Criteria* are:

- Synchronous courses will now be considered equivalent to in-person classroom courses.
- Synchronous courses will no longer be required to have delivery mechanism approval under the *Criteria* and an alternative course delivery mechanism approval for asynchronous courses was introduced.
- Hybrid courses must meet the requirements for each specific course delivery method (e.g., a course that is hybrid synchronous/asynchronous must meet the synchronous requirements for the synchronous portion of the course and the asynchronous requirements for the asynchronous portion of the course).
- Qualifying and continuing education courses may use remote proctoring, including bio-metric proctoring.

These changes will go into effect on January 1, 2022.

The Appraiser Qualifications Board also adopted a General Interpretation of the *Criteria* to emphasize that education and experience verification must be completed before an applicant is approved to sit for the National Exam, and that applicants cannot self-verify their experience to qualify for the National Exam.

For more information, please visit appraisalfoundation.org.



About The Appraisal Foundation

The Appraisal Foundation is the nation's foremost authority on the valuation profession. The organization sets the Congressionally-authorized standards and qualifications for real estate appraisers, and provides voluntary guidance on recognized valuation methods and techniques for all valuation professionals. This work advances the profession by ensuring appraisals are independent, consistent, and objective. More information on The Appraisal Foundation is available at www.appraisalfoundation.org.

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This message was sent to **tyler.kohtz@nebraska.gov** from **news@appraisalfoundation.org**

The Appraisal Foundation
1155 15th Street NW STE 1111
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First Exposure Draft

2023 USPAP

August 18, 2021

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¹ The Appendices show all proposed changes (proposed insertions and deletions). For ease of reading, only text proposed for insertion is shown in the sections before the Appendices.

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Introduction

Proposed Changes for the 2023 Edition of the *Uniform Standards of Professional Appraisal Practice* (USPAP)

The goal of the *Uniform Standards of Professional Appraisal Practice* (USPAP) is to promote and maintain a high level of public trust in appraisal practice by establishing requirements for appraisers. With this goal in mind, the Appraisal Standards Board (ASB) regularly solicits and receives comments and suggestions for improving USPAP. Proposed changes are intended to improve USPAP understanding and enforcement, and thereby achieve the goal of promoting and maintaining public trust in appraisal practice.

Based on feedback, prior exposure drafts, and other sources, the ASB is currently considering changes for the 2023 edition of USPAP. Please note this edition will be labeled *2023 USPAP*, but its end date will be undetermined. Due to the lengthy process involved in promulgating new editions of USPAP, the public will be given at least one year's notice in advance of a new edition USPAP becoming effective.

Changes proposed in this First Exposure Draft for the 2023 USPAP include adding an interpretation within the ETHICS RULE, and a major change related to what information an appraisal report will contain information related to an appraiser's inspection. This Exposure Draft also includes a proposed requirement to a development and reporting requirement relating to transfers of a property. And lastly, there are proposed modifications and/or deletions of some definitions and minor edits to the USPAP publication. If you have any questions, please contact the Board at ASB@appraisalfoundation.org.

On behalf of the ASB, thank you for taking time to review and respond to this exposure draft.

Michelle Czekalski Bradley
Chair, Appraisal Standards Board

Join the Conversation

Appraisal Standards Board Chair, Michelle Czekalski Bradley, and Appraisal Foundation Vice President of Appraisal Issues, Lisa Desmarais, will host a webinar to discuss this Exposure Draft on September 2, 2021, at 1:00 PM ET (10:00 AM PT). Register [here](#) to attend the webinar.

The ASB will also accept verbal comments at its virtual public meeting on Thursday, October 28, 2021. You may register to attend the virtual meeting by visiting: https://us02web.zoom.us/webinar/register/WN_VDzgTWtCQfSz3nWApSUVow.

All interested parties are encouraged to comment in writing to the ASB before the deadline of October 11, 2021. Each member of the ASB will thoroughly read and consider all comments.

Send Your Comments by October 11, 2021

The format of this exposure draft is new. Rationale for any changes is presented in the first part without line numbers. Complete proposed changes are organized in the second part, an appendix, and are shown with line numbers. This difference is intended to distinguish for the reader those parts that explain the changes to USPAP from the proposed changes themselves. Where text is proposed for deletion in USPAP, that text is shown as strikethrough. For example: ~~This is strikethrough text proposed for deletion.~~ Text that is proposed to be added to USPAP is underlined. For example: This is text proposed for insertion.

Please go to the [Appendices](#) to see all proposed text changes (text that is either proposed for insertion or deletion).

When commenting on various aspects of the exposure draft, it is very helpful to reference sections and line numbers, fully explain the reasons for concern or support, provide examples or illustrations, and suggest any alternatives or additional issues the ASB should consider.

To submit comments, please visit: <https://www.surveymonkey.com/r/ASBComments>

For ease of processing, we prefer you use the SurveyMonkey for your comments. If you are unable to provide your comments via SurveyMonkey, you may also email ASB@appraisalfoundation.org.

All written comments will be posted for public viewing, exactly as submitted, on the website of The Appraisal Foundation. Names may be redacted upon request. The Appraisal Foundation reserves the right not to post written comments that contain offensive or inappropriate statements.

Section 1: ETHICS RULE

The ASB proposes adding an interpretation to one part of the ETHICS RULE. This interpretation, which is in the form of a Comment, will establish the context and conditions for application of “unsupported conclusions.”

Recently, there has been intense media focus on issues relating to discrimination, fair housing, and property values. These issues are, taken as a whole, very complex and involve layers of social, economic, and urban planning matters, most of which go well beyond USPAP. However, since appraisal is one facet of the greater mortgage lending process, the appraisal, the appraisal body of knowledge, and the appraisal process have become part of the discussion.

More specifically, there have been discussions about comparable sale selection by appraisers and questions about how appraisers support some of their conclusions related to value. The ASB does not own or control the general appraisal body of knowledge and therefore cannot establish or amend practices related to the appropriate selection of data in any valuation assignment. However, the Conduct Section of the ETHICS RULE clearly indicates the following:

An appraiser must not perform an assignment with bias.

Further, the Conduct section of the ETHICS RULE goes on to state the following:

*An appraiser must not use or rely on **unsupported** conclusions relating to characteristics such as race, color, religion, national origin, gender, marital status, familial status, age, receipt of public assistance income, handicap, or an unsupported conclusion that homogeneity of such characteristics is necessary to maximize value.*

After issuing a Discussion Draft on this topic, the ASB received feedback not only from appraisers, but also from those in the appraisal regulatory arena. Several made the point that the above sentence contains a reference to **unsupported** opinions and conclusions, which might be interpreted to imply that a **supported** opinion or conclusion based on certain characteristics of people may be acceptable.

Advisory Opinion 16, which is guidance that illustrates the applicability of USPAP in specific situations, but is not a part of USPAP, offers some clarity on this by stating:

*In some cases, even **supported** conclusions in assignments relating to characteristics such as race, color, religion, national origin, gender, marital status, familial status, age, receipt of public assistance income, handicap, or group homogeneity cannot be used because they are precluded by applicable law.*

However, given that the Advisory Opinion is an illustration of the applicability of USPAP and not a part of USPAP, the argument has been made that, in the best interest of public trust, the ASB should consider adding language to the ETHICS RULE to answer the question: Are supported conclusions based on the listed characteristics allowed under USPAP?

This question has largely come from government regulatory agencies. The agencies have expressed concern that real property appraisers may *incorrectly* conclude that a **supported** conclusion related to the above listed characteristics of protected classes is appropriate to use, even in situations where those considerations may be in violation of state and federal laws.

The ETHICS RULE applies to all appraisers, all assignments, and is applicable for all appraisal disciplines. The ETHICS RULE specifies the personal obligations and responsibilities of the individual appraiser; it is not meant to address additional requirements for different types of appraisal or appraisal review assignments. Therefore, any requirement in the ETHICS RULE cannot be written to address just one appraisal discipline (e.g., real property appraisal), nor can it be written to reflect individual laws that apply to all the different appraisal or appraisal review assignments. However, the ETHICS RULE can include, in the form of a Comment, an interpretation to establish the general context and condition for the application of **supported** conclusions based on the characteristics of protected classes.

Adoption of this Comment will make it clear that a supported conclusion related to the characteristics of these protected classes is the exception, not the rule.

The language proposed to be added to the ETHICS RULE is written to address a few points related to supported conclusions based on characteristics such as race, color, religion, national origin, gender, marital status, familial status, age, receipt of public assistance income, and disability:

- The ETHICS RULE is applicable for all appraisal disciplines (real property, personal property, and business appraisal).
- The laws that are applicable to each appraisal or appraisal review vary greatly by assignment.
- Fair housing laws apply only to real property appraisal.
- Supported conclusions based on any of the characteristics listed in the ETHICS RULE may violate state or federal laws regarding discrimination in most instances for real property residential appraisal.
- Supported conclusions related to the listed characteristics may not violate any laws in other instances. For example, if a business appraisal is being completed on a business that makes products for one specific ethnic group, the business appraisal would likely need to use supported conclusions based upon the characteristics of the group of people that the specific business serves.

Taking all the above into consideration, the ASB is proposing adding a Comment to part of the ETHICS RULE. The Comment will establish the context and conditions for using supported conclusions.

If adopted, the new Comment in the ETHICS RULE would appear as noted below.

CONDUCT:

An appraiser must perform assignments with impartiality, objectivity, and independence, and without accommodation of personal interests.

An appraiser:

- must not perform an assignment with bias;
- must not advocate the cause or interest of any party or issue;
- must not agree to perform an assignment that includes the reporting of predetermined opinions and conclusions;
- must not misrepresent his or her role when providing valuation services that are outside of appraisal practice;
- must not communicate assignment results with the intent to mislead or to defraud;
- must not use or communicate a report or assignment results known by the appraiser to be misleading or fraudulent;
- must not knowingly permit an employee or other person to communicate a report or assignment results that are misleading or fraudulent;
- must not use or rely on unsupported conclusions relating to characteristics such as race, color, religion, national origin, gender, marital status, familial status, age, receipt of public assistance income, disability, or an unsupported conclusion that homogeneity of such characteristics is necessary to maximize value;
Comment: In most instances, even supported conclusions based on one or more of the characteristics noted above must be avoided. Supported conclusions based on the characteristics of protected classes may be allowed if those conclusions are: (1) not precluded by applicable law; (2) necessary for credible assignment results; and (3) based on relevant evidence and logic.
- must not engage in criminal conduct;
- must not willfully or knowingly violate the requirements of the RECORD KEEPING RULE; and
- must not perform an assignment in a grossly negligent manner.

Note: the word “disability” is an administrative edit, replacing the word “handicap.”

These proposed changes can also be found in [Appendix 1: ETHICS RULE](#)

Section 2: PERSONAL INSPECTION AND THE CERTIFICATION

Each appraisal report must contain a signed certification which must address certain elements. One of the elements in the certification (a “certification statement”) is being proposed for deletion:

I have (or have not) made a personal inspection of the property that is the subject of this report. (If more than one person signs this certification, the certification must clearly specify which individuals did and which individuals did not make a personal inspection of the appraised property.)

The logic and reasons for deleting the above certification statement² (which will be referred to in this rationale as the “*I have (or have not)*” certification statement), are summarized below in a question-and-answer format.

The deletion of this certification statement would have no impact on the appraiser’s requirement to still consider if an inspection is necessary for credible assignment results, given the intended use of the assignment. This proposed change is only related to reporting requirements.

What is the logic behind the proposed change?

The above certification statement is related to the narrow concept of a *personal inspection*. USPAP currently distinguishes a *personal inspection* from an *inspection*. In proposing to remove all references to a *personal inspection*, USPAP will no longer require the appraisal report to distinguish the appraiser’s *personal inspection* as something that may be different from an appraiser’s inspection; they will be one and the same.

Thus, the ASB is proposing to remove this certification statement, and the definition of PERSONAL INSPECTION.

Why is this change being proposed now?

In today’s world, appraisers have more tools and methods available to them for inspecting a property than they did even a few years ago. These tools have rendered the *personal inspection* as being nearly indistinguishable from an “inspection.” For example, unmanned aerial devices, and homeowner assisted video inspections. The appraiser will no longer need to worry about trying to conclude if the inspection they perform, using technologies in lieu of, or as a part of physical, on-site visits, are a *personal inspection* or not.

² For ease of communication in this Exposure Draft, when discussing an individual element of a certification, it will be referred to as a “certification statement”.

If deleted, does this mean the appraiser no longer has to disclose if they did or did not perform an inspection?

The ASB is also proposing to add a reporting requirement specifically related to the appraiser's inspection into some of the reporting standards (STANDARDS 2, 4, 6, and 8). While USPAP does not require an appraisal or appraisal review to include an appraiser's property inspection, USPAP has always required the appraisal report to contain information indicating whether the appraiser **has or has not** personally inspected the subject property. Up until this proposed change, the way this information was communicated was with a signed certification. Now, the required responsibility to disclose the information will reside in the reporting standards, and more specifically in the applicable reporting Standard Rule that addresses the scope of work disclosure.

Please see Section 3 for more information.

This proposed change, if adopted, will appear in the following places:

Standards Rule 2-3(a)	Standards Rule 6-3(a)
Standards Rule 4-3(a)	Standards Rule 8-3(a)

To view the complete proposed changes for each of the Standards Rules listed above, go to [Appendix 2: CERTIFICATION](#).

Section 3: DISCLOSURE IN REPORTING

Introduction to the Proposed Change.

Section 2 above discusses the rationale for proposing the deletion of one element of the certification in the reporting Standards. This Section 3 relates directly to that proposed change. If Section 2's proposed deletion of the *personal inspection* element of the certification is adopted, the ASB proposes the following change.

Summary of the Change

The proposed change would be in reporting STANDARDS 2, 4, 6, and 8. For the purposes of illustration, the proposed change is shown below using STANDARD 2³ as an example.

Here is the Standards Rule as it appears now:

STANDARDS RULE 2-2(a)(viii)

The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

summarize the scope of work used to develop the appraisal;

Comment: *Summarizing the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.*

³ Note that in the example, the change is only shown for an Appraisal Report.

The requirements from the certification have now been incorporated into the scope of work disclosure section:

Standards Rule 2-2(a)(viii)

The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

summarize the scope of work used to develop the appraisal;

Comment: Summarizing the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, summarize the type and extent of the inspection(s). In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

This change is related to the Section 2's proposed deletion of the "I have (or have not)" certification statement about a "personal inspection." With the removal of that element from the certification, the ASB believes the appraisal report must still include disclosure(s) specifically related to inspection(s) or to the lack of one.

If adopted, this will provide appraisers with more flexibility regarding property inspections. Instead of the appraiser having to determine if the tool they are using qualifies their inspection as a "personal inspection" or not, the appraiser will now have more flexibility and the responsibility to accurately communicate one of two things:

1. The type and extent of the appraiser's inspection(s), or
2. If the appraiser(s) did not perform an inspection(s).

While an appraiser currently has the option to decide what information to include in a report about "research and analysis not performed" relating to the scope of work disclosure, the ASB recognizes that clients and intended users often view the existence of an appraiser's inspection as an integral part of the appraisal process. USPAP has always required that the appraisal report include information indicating whether the appraiser did or did not inspect the subject property.

Note that in the above proposed requirement, some of the key language is:

"...performed as a part of the scope of work...."

This is a very important distinction to make. An appraiser may receive, from the client, a copy of an inspection report about the property. That inspection report is just data, and

the person who completed that inspection report is not performing the scope of work for the appraisal assignment.

With this proposed change, the ASB is clarifying that disclosure in the appraisal report is necessary only when an inspection is **performed as part of the scope of work**. An inspection that was completed outside of the appraisal assignment, *i.e.*, outside of the scope of work, is not to be confused with the appraiser's inspection.

This “scope of work” language makes it clear to clients and intended users what part of any inspection that may have been completed was performed by the same appraiser(s) who are completing the appraisal or appraisal review assignment. Further, it also protects the public trust by making it clear if the individual who inspected the property (whatever that inspection consisted of) was acting as an appraiser or not. Only an appraiser can perform the scope of work in an appraisal assignment.

If a change were adopted, the requirement for an Appraisal Report would be:

Comment: Summarizing the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed. When an inspection(s) was performed as part of the scope of work, summarize the type and extent of the inspection(s). In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

And, for a Restricted Appraisal Report, it would be:

Comment: Stating the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed. When an inspection(s) was performed as part of the scope of work, state the type and extent of inspection(s) performed. In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

The addition of these sentences in the Comment, if adopted, will now appear in the following places:

Standards Rule 2-2(a)(viii)	Standards Rule 6-2(g)
Standards Rule 2-2(b)(x)	Standards Rule 8-2(a)(viii)
Standards Rule 4-2(g)	Standards Rule 8-2(b)(x)

To view the complete proposed changes for each of the Standards Rules listed above, go to [Appendix 3: DISCLOSURE IN REPORTING](#).

Section 4: TRANSFERS AND SALES

STANDARDS 1, 7, and 9 have requirements, under certain circumstances, where the appraiser would need to analyze prior sales of a subject property. However, it has been brought to the ASB's attention that while a "sale of a property" is essentially a "transfer of a property," there is a minor technical difference between the two. A sale always includes a transfer, but a transfer may not always technically include a sale.

While this issue is directly related to the work of real property appraisers (STANDARDS 1 and 2), personal property appraisers (STANDARDS 7 and 8), and business appraisers (STANDARDS 9 and 10), the issue is of particular importance to the business appraisers.

For business appraisers, when it comes to the sale of companies, those sales are often structured in ways that are not considered "true" sales. For example, they can be re-organizations, mergers, or other legal processes which convey or transfer an interest from one person (or entity) to another. There might even be partial transfers of businesses.

While USPAP guidance has always maintained that a "sale" and a "transfer" are essentially the same, enough questions have been raised about the issue that the ASB is now proposing this change.

If adopted, here is one example of what the requirement would be:

Standards Rule 1-5, SALE AGREEMENTS, OPTIONS, LISTINGS, PRIOR SALES, AND OTHER TRANSFERS

When the value opinion to be developed is market value, an appraiser must, if such information is available to the appraiser in the normal course of business:

- (a) analyze all agreements of sale, options, and listings of the subject property current as of the effective date of the appraisal; and
- (b) analyze all sales and other transfers of the subject property that occurred within the three (3) years prior to the effective date of the appraisal.

The addition of the words "and other transfers," if adopted, would then appear in the development and reporting standards in the following places:

Standards Rule 1-5(b)	Standards Rule 8-2(a)(x)(3)
Standards Rule 2-2(a)(x)(3)	Standards Rule 8-2(b)(xii)(3)
Standards Rule 2-2(b)(xii)(3)	Standards Rule 9-4(b)
Standards Rule 7-5(b)	

To view the complete proposed changes for each of the Standards Rules listed above, go to [Appendix 4: TRANSFERS AND SALES](#).

Section 5: DEFINITIONS TO RETIRE

Definition of Misleading

The definition of MISLEADING is proposed for deletion. While some stakeholders presented valid reasons for retaining it, others presented even more convincing arguments for deletion. If the change is adopted, the term will revert to its common dictionary definition and will no longer have a specific USPAP definition.

To view the definition being proposed for deletion, go to [Appendix 5: DEFINITIONS TO RETIRE, Misleading](#).

Definition of Relevant Characteristics

The definition of RELEVANT CHARACTERISTICS is proposed for deletion as it was brought to the ASB's attention that the current wording could be interpreted to mean that relevant characteristics **must** be concluded **prior** to the appraiser determining and performing the scope of work. While relevant characteristics are identified prior to the appraiser performing the scope of work, it is possible that while performing the scope of work, the appraiser discovers other relevant characteristics that could necessitate a change in the scope of work performed.

If adopted, there will no longer be a definition of relevant characteristics in USPAP.

To view the definition being proposed for deletion, go to [Appendix 5: DEFINITIONS TO RETIRE, Relevant Characteristics](#).

Definition of Personal Inspection

The ASB has proposed to delete the *personal inspection* element of the certification, and if that change is adopted, the definition of PERSONAL INSPECTION is no longer necessary.

Even if the ASB does not adopt the removal of the *personal inspection* element from the certification, the ASB would still propose deleting the definition of PERSONAL INSPECTION. As noted above, technology and tools available to appraisers have continued to evolve, expanding the concept of what an inspection can be. Moreover, USPAP does not require a property to be inspected. Thus, in trying to define what one type of inspection is over another type of inspection, it has reached a point where the ASB has concluded the line between an *inspection* and a *personal inspection* is not always discernable.

Removing the definition of personal inspection will make it clear that USPAP leaves it up to the appraiser (in communication with the client) to determine:

- If an inspection is necessary
- If the inspection will be a part of the scope of work performed, or if the client will have a property inspection done outside of the appraisal assignment
- If an inspection is needed, what type of inspection should be done
- If an inspection is needed, to what extent that inspection should be done
- If an inspection is needed, what tools may be used to assist with conducting that inspection.

In other words, without distinguishing the difference between an *inspection* and a *personal inspection*, USPAP gives the appraiser broad flexibility and significant responsibility to determine how to handle a property inspection and to not have to make an unnecessary distinction between a *personal inspection* and an *inspection*.

If adopted, there will no longer be a definition of PERSONAL INSPECTION in USPAP.

To view the definition being proposed for deletion, go to [Appendix 5: DEFINITIONS TO RETIRE, Personal Inspection](#).

Section 6: DEFINITIONS TO MODIFY

The ASB is proposing three definitions for modification: APPRAISER, ASSIGNMENT ELEMENTS, and WORKFILE. The rationale and the proposed modification for each definition is noted below.

Definition of Appraiser

The current definition of APPRAISER in USPAP is:

APPRAISER: *one who is expected to perform valuation services competently and in a manner that is independent, impartial, and objective.*

The ASB is proposing to reinstate the following original Comment that appeared in the 2018-2019 edition of USPAP into the definition of APPRAISER:

Comment: *Such expectation occurs when individuals, either by choice or by requirement placed upon them or upon the service they provide by law, regulation, or agreement with the client or intended users, represent that they comply.⁴*

Footnote ⁴: See PREAMBLE and Advisory Opinion 21, USPAP Compliance

Prior to the removal of this Comment in the 2020-2021 USPAP (Effective January 1, 2020 through December 31, 2022), the Comment had existed in the definition since the year 2000 but was removed from the current edition in an effort to reformat some of the definitions. The removal of the Comment had been exposed to the public multiple times with no notable objections.

However, after its removal, stakeholders recognized that, in practice, the Comment provided important information that was needed to fully understand the definition. Therefore, the ASB is proposing to reinstate the Comment, exactly as it appeared in prior editions of USPAP.

The Comment was originally in USPAP to make clear where the expectation that an appraiser has an obligation to comply with USPAP comes from. And, while Advisory Opinion 21 explains the relationship between that expectation and who should comply with USPAP, and the PREAMBLE explains the concept of what it means to comply with USPAP, stakeholders stated that was not enough. The Comment made it abundantly clear, without having to look to different sections in the USPAP publication, where the expectation comes from for an individual who is acting as an appraiser should comply with USPAP.

The ASB agrees and is proposing to reinstate the Comment, as it was in the prior edition of USPAP.

If adopted, the definition would appear exactly as it previously appeared in the 2018-2019 edition of USPAP, as follows:

APPRAISER: one who is expected to perform valuation services competently and in a manner that is independent, impartial, and objective.

Comment: Such expectation occurs when individuals, either by choice or by requirement placed upon them or upon the service they provide by law, regulation, or agreement with the client or intended users, represent that they comply.⁵

Footnote ⁵: See PREAMBLE and Advisory Opinion 21, USPAP Compliance

This change can also be found in [Appendix 6: DEFINITIONS TO MODIFY, Appraiser](#).

Definition of Assignment Elements

The definition of ASSIGNMENT ELEMENTS in USPAP is:

ASSIGNMENT ELEMENTS: *Specific information needed to identify the appraisal or appraisal review problem: client and any other intended users; intended use of the appraiser's opinions and conclusions; type and definition of value; effective date of the appraiser's opinions and conclusions; subject of the assignment and its relevant characteristics; and assignment conditions.*

The definition includes a list of the assignment elements, as stated in the Problem Identification section of the SCOPE OF WORK RULE, which are applicable in every appraisal assignment. However, in a few circumstances, the assignment elements listed above may not be the exact ones that are applicable in some appraisal review assignments.

Rather than list the assignment elements separately for both appraisal and appraisal review assignments, the ASB proposes to remove the list from the definition.

If adopted, here is how the definition would appear:

ASSIGNMENT ELEMENTS: Specific information needed to identify the appraisal or appraisal review problem.

To view the complete proposed change, go to [Appendix 6: DEFINITIONS TO MODIFY, Assignment Elements](#).

Definition of Workfile

The ASB proposes to amend the definition of WORKFILE. The current definition is:

WORKFILE: *data, information, and documentation necessary to support the appraiser's opinions and conclusions and to show compliance with USPAP.*

The PREAMBLE states that an appraiser “*must maintain the data, information and analysis necessary to support his or her opinions for appraisal or appraisal review assignments*”. The main purpose, then, of a workfile, is to contain the documentation necessary to *support* the appraiser's opinions and conclusions. The definition was reworded slightly for the 2018-2019 edition of USPAP after being exposed for change several times. Minimal comments were provided to this change, and the current definition was adopted.

In practice, however, the ASB received feedback that argued for changing the definition back to how it appeared in the 2018-2019 edition of USPAP. While part of the function of the workfile may be to serve as proof that an appraiser complied with USPAP, that is not its main function. It is not possible for the workfile to serve as the only proof of compliance.

The ASB proposes to reinstate the definition of workfile as it appeared in the 2018-2019 edition of USPAP.

If adopted, the definition would appear as follows:

WORKFILE: documentation necessary to support the appraiser's opinions and conclusions.

To view the complete proposed change, go to [Appendix 6: DEFINITIONS TO MODIFY, Workfile](#).

Section 7: DEFINITIONS TO ADD

Over the past year or more, the ASB has been considering the way that USPAP currently uses pronouns. After studying all possible options, and weighing the pros and cons of the various ways pronouns are used in USPAP, the ASB is proposing to add the following definition:

HIS OR HER: Traditional gender-related pronouns, such as “he”, “his”, “him”, “himself”, or “she”, “her” or “herself,” are to be construed as gender neutral and include persons who identify themselves as non-binary, e.g., agender, bigender.

The ASB considered replacing “his and her” in USPAP with the word “their” or the words “the appraiser”. In theory, both are feasible, however, there ended up being numerous considerations for a best solution given the words in USPAP are often used in a legal context. For example, in practice, just replacing one set of words with another set sometimes results in either awkward sentences or even in a changed meaning to the sentence.

The above solution is intended to be respectful of all individuals, clarifies exactly what the use of these words are meant to convey, and does not result in unintended changes to the content of USPAP.

This addition can also be found in [Appendix 7: DEFINITIONS TO ADD](#).

Section 8: MINOR EDITS

As the appraisal profession evolves, sometimes changes require a closer look at some of the individual words used in USPAP. Below are four proposed edits which: (1) update a term, (2) create consistency between one standard and another, (3) solidify a concept that already exists in USPAP, or (4) refine a meaning.

These are not significant changes and should have minimal impact on an appraiser's day-to-day appraisal practice.

Minor Change in 2-3, 4-3, 6-3, 8-3, and 10-3

The ASB is proposing to replace the word “summary” with “the description” in one sentence in each of the certification requirements for STANDARDS 2, 4, 6, 8, and 10. To explain this change, we will use STANDARD 2 as an example.

In the reporting Standards and specifically in the Certification requirements, there is a section that deals with significant appraisal assistance and where disclosures related to the assistance may appear in a report:

*Comment⁶: Although a certification must contain the names of individuals providing significant real property appraisal assistance, it is not required that a **summary** of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report. (**bold added for emphasis**)*

The requirements to report the extent of any significant appraisal assistance come from the requirements for an Appraisal Report and for a Restricted Appraisal Report. Each requirement is:

For an Appraisal Report (Standard Rule 2-2(a)(ix)):

*...**summarize** the extent of any significant real property appraisal assistance*

For a Restricted Appraisal Report (Standard Rule 2-2(b)(xi))

*...**state** the extent of any significant real property appraisal assistance*

Thus, depending on which reporting option is used, the appraiser is required to, at a minimum, either state or summarize the extent of the assistance. To be certain both options are encapsulated in the requirement, the ASB is proposing to replace the word “summary” with the word “description.”

⁶ In STANDARD 2, this comment is located on lines 734-736 and is a part of Standards Rule 2-3(c)(ii).

If adopted, the requirement would now read as follows:

Comment: Although a certification must contain the names of individuals providing significant real property appraisal assistance, it is not required that the description of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report.

This proposed change, if adopted, will now appear in the following places:

Standards Rule 2-3(c)(ii)	Standards Rule 8-3(c)(ii)
Standards Rule 4-3(c)(ii)	Standards Rule 10-3(c)(ii)
Standards Rule 6-3(c)(ii)	

To view the complete proposed changes for each of the Standards Rules listed above, go to [Appendix 8: MINOR EDITS, Minor Change in 2-3, 4-3, 6-3, 8-3, and 10-3](#).

Minor Change in STANDARD 6

STANDARD 6 addresses how an appraiser should report the results of a mass appraisal. The ASB has always held that STANDARD 6 does not include an option for an oral report, however, this is not directly stated. While several stakeholders have inquired about this recently, the ASB proposes the current edit to the opening line of STANDARD 6 so this is abundantly clear:

STANDARD 6: MASS APPRAISAL, REPORTING

In reporting the results of a mass appraisal, an appraiser must communicate each analysis, opinion, and conclusion in writing and in a manner that is not misleading.

To view the complete proposed change, go to [Appendix 8: MINOR EDITS, Minor Change in Standard 6](#).

Minor change in Standards Rule 8-2(b)(xiii)(3)

The ASB proposes adding words to a requirement in 8-2(b) so that it is consistent with the exact wording in 8-2(a). This proposed change has already been exposed several times for adoption with no notable objections. It is not a concept change or an added requirement; rather, the addition of these words would make the language in 8-2 internally consistent.

Here is the current wording⁷ in the two sections as they appear in the current edition of USPAP. **The part highlighted in gray is the wording that currently exists in 8-2(a) which is proposed to be added to 8-2(b).**

Standards Rule 8-2(a)(x)(3)

The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum, provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 7 by:

summarizing the results of analyzing the subject property's sales, agreements of sale, options, and listings when, in accordance with Standards Rule 7-5, it was necessary for credible assignment results and if such information was available to the appraiser in the normal course of business;

Standards Rule 8-2(b)(xii)(3)

The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum, provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 7 by:

summarizing the results of analyzing the subject sales, agreements of sale, options, and listings in accordance with Standards Rule 7-5;

⁷ Please note that for ease of reading, the format or layout of these words is not as they appear in USPAP. This is for illustrative purposes.

If this change is adopted, the requirement will read as follows:

Standards Rule 8-2(b)(xii)(3)

The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum, provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 7 by:

summarizing the results of analyzing the subject property's sales, agreements of sale, options, and listings when, in accordance with Standards Rule 7-5, it was necessary for credible assignment results and if such information was available to the appraiser in the normal course of business.

If this change and the change noted in Section 4: TRANSFERS AND SALES are both adopted, the requirement will read as follows*:

Standards Rule 8-2(b)(xii)(3)

The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum, provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 7 by:

summarizing the results of analyzing the subject property's sales and other transfers, agreements of sale, options, and listings when, in accordance with Standards Rule 7-5, it was necessary for credible assignment results and if such information was available to the appraiser in the normal course of business.

**The edits shown above include the addition of the proposed edits from Section 4 of this Exposure Draft. If that proposed edit is adopted and this proposed edit is adopted, this is how the requirement will appear.*

To view the complete proposed change, go to [Appendix 8: MINOR EDITS, Minor Change in 8-2](#).

Appendices

First Exposure Draft
2023 USPAP

Appendix 1: ETHICS RULE

CONDUCT:

An appraiser must perform assignments with impartiality, objectivity, and independence, and without accommodation of personal interests.

An appraiser:

- **must not perform an assignment with bias;**
- **must not advocate the cause or interest of any party or issue;**
- **must not agree to perform an assignment that includes the reporting of predetermined opinions and conclusions;**
- **must not misrepresent his or her role when providing valuation services that are outside of appraisal practice;¹³**
- **must not communicate assignment results with the intent to mislead or to defraud;**
- **must not use or communicate a report or assignment results known by the appraiser to be misleading or fraudulent;**
- **must not knowingly permit an employee or other person to communicate a report or assignment results that are misleading or fraudulent;**
- **must not use or rely on unsupported conclusions relating to characteristics such as race, color, religion, national origin, gender, marital status, familial status, age, receipt of public assistance income, ~~handicap disability~~, or an unsupported conclusion that homogeneity of such characteristics is necessary to maximize value;**

Comment: In most instances, even supported conclusions based on one or more of the characteristics noted above must be avoided. Supported conclusions based on the characteristics of protected classes may be allowed if those conclusions are: (1) not precluded by applicable law; (2) necessary for credible assignment results; and (3) based on relevant evidence and logic.

- **must not engage in criminal conduct;**
- **must not willfully or knowingly violate the requirements of the RECORD KEEPING RULE; and**
- **must not perform an assignment in a grossly negligent manner.**

Comment: Development standards (1-1, 3-1, 5-1, 7-1 and 9-1) address the requirement that “an appraiser must not render appraisal services in a careless or negligent manner.” The above requirement deals with an appraiser being grossly negligent in performing an assignment which would be a violation of the Conduct section of the ETHICS RULE.

If known prior to agreeing to perform an assignment, and/or if discovered at any time during the assignment, an appraiser must disclose to the client, and in each subsequent report certification:

- any current or prospective interest in the subject property or parties involved; and
- any services regarding the subject property performed by the appraiser, as an appraiser or in any other capacity, within the three-year period immediately preceding the agreement to perform the assignment.

Comment: Disclosing the fact that the appraiser has previously appraised the property is permitted except in the case when an appraiser has agreed with the client to keep the mere occurrence of a prior assignment confidential. If an appraiser has agreed with a client not to disclose that he or she has appraised a property, the appraiser must decline all subsequent agreements to perform assignments that fall within the three-year period.

In assignments in which there is no appraisal or appraisal review report, only the initial disclosure to the client is required.

Appendix 2: CERTIFICATION

Standards Rule 2-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(a) The wording of a certification does not have to match the following verbatim, but each of the elements must be addressed:

I certify that, to the best of my knowledge and belief:

- the statements of fact contained in this report are true and correct.
- the reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no (or the specified) present or prospective interest in the property that is the subject of this report and no (or the specified) personal interest with respect to the parties involved.
- I have performed no (or the specified) services, as an appraiser or in any other capacity, regarding the property that is the subject of this report within the three-year period immediately preceding the agreement to perform.
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
- my engagement in this assignment was not contingent upon developing or reporting predetermined results.
- my compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
- my analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
- ~~– I have (or have not) made a personal inspection of the property that is the subject of this report. (If more than one person signs this certification, the certification must clearly specify which individuals did and which individuals did not make a personal inspection of the appraised property.)⁸~~
- no one provided significant real property appraisal assistance to the person signing this certification. (If there are exceptions, the name of each individual providing significant real property appraisal assistance must be stated.)

~~Footnote ⁸: See Advisory Opinion 2, *Inspection of Subject Property*.~~

Standards Rule 4-3, CERTIFICATION

A signed certification is an integral part of the appraisal review report.

(b) The wording of a certification does not have to match the following verbatim, but each of the elements must be addressed:

I certify that, to the best of my knowledge and belief:

- the statements of fact contained in this report are true and correct.
- the reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no (or the specified) present or prospective interest in the property that is the subject of the work under review and no (or the specified) personal interest with respect to the parties involved.
- I have performed no (or the specified) services, as an appraiser or in any other capacity, regarding the property that is the subject of the work under review within the three-year period immediately preceding the agreement to perform this assignment.
- have no bias with respect to the property that is the subject of the work under review or to the parties involved with this assignment.
- my engagement in this assignment was not contingent upon developing or reporting predetermined results.
- my compensation is not contingent on an action or event resulting from the analyses, opinions, or conclusions in this review or from its use.
- my compensation for completing this assignment is not contingent upon the development or reporting of predetermined assignment results or assignment results that favors the cause of the client, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal review.
- my analyses, opinions, and conclusions were developed and this review report was prepared in conformity with the *Uniform Standards of Professional Appraisal Practice*.
- ~~— I have (or have not) made a personal inspection of the subject of the work under review. (If more than one person signs this certification, the certification must clearly specify which individuals did and which individuals did not make a personal inspection of the subject of the work under review.) (For reviews of a business or intangible asset appraisal assignment, the inspection portion of the certification is not applicable.)⁹~~
- no one provided significant appraisal or appraisal review assistance to the person signing this certification. (If there are exceptions, the

name of each individual providing appraisal or appraisal review assistance must be stated.)

~~Footnote ⁹: See Advisory Opinion 2, *Inspection of Subject Property*.~~

Standards Rule 6-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(a) The wording of a certification does not have to match the following verbatim, but each of the elements must be addressed:

I certify that, to the best of my knowledge and belief:

- the statements of fact contained in this report are true and correct.
- the reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions, and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no (or the specified) present or prospective interest in the property that is the subject of this report, and no (or the specified) personal interest with respect to the parties involved.
- I have performed no (or the specified) services, as an appraiser or in any other capacity, regarding the property that is the subject of this report within the three-year period immediately preceding the agreement to perform this assignment.
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
- my engagement in this assignment was not contingent upon developing or reporting predetermined results.
- my compensation for completing this assignment is not contingent upon the reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
- my analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
- ~~— I have (or have not) made a personal inspection of the properties that are the subject of this report. (If more than one person signs this certification, the certification must clearly specify which individuals did and which individuals did not make a personal inspection of the appraised property.)¹⁰~~
- no one provided significant mass appraisal assistance to the person signing this certification. (If there are exceptions, the name of each

individual providing significant mass appraisal assistance must be stated.)

Comment: The above certification is not intended to disturb an elected or appointed assessor's work plans or oaths of office.

~~Footnote ¹⁰: See Advisory Opinion 2, *Inspection of Subject Property*.~~

Standards Rule 8-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(a) The wording of a certification does not have to match the following verbatim, but each of the elements must be addressed:

I certify that, to the best of my knowledge and belief:

- the statements of fact contained in this report are true and correct.
- the reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no (or the specified) present or prospective interest in the property that is the subject of this report and no (or the specified) personal interest with respect to the parties involved.
- I have performed no (or the specified) services, as an appraiser or in any other capacity, regarding the property that is the subject of this report within the three-year period immediately preceding the agreement to perform this assignment.
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
- my engagement in this assignment was not contingent upon developing or reporting predetermined results.
- my compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
- my analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
- ~~— I have (or have not) made a personal inspection of the property that is the subject of this report. (If more than one person signs this certification, the certification must clearly specify which individuals~~

206 ~~did and which individuals did not make a personal inspection of the~~
207 ~~appraised property.)¹¹~~
208 — no one provided significant personal property appraisal assistance
209 to the person signing this certification. (If there are exceptions, the
210 name of each individual providing significant personal property
211 appraisal assistance must be stated.)
212 ~~Footnote ¹¹: See Advisory Opinion 2, *Inspection of Subject Property*.~~

Appendix 3: DISCLOSURE IN REPORTING

Standards Rule 2-2, CONTENT OF A REAL PROPERTY APPRAISAL REPORT

Each written real property appraisal report must be prepared under one of the following options and prominently state which option is used: Appraisal Report or Restricted Appraisal Report.

An appraiser may use any other label in addition to, but not in place of, the labels set forth in this Standards Rule for the type of report provided. The use of additional labels such as analysis, consultation, evaluation, study, or valuation does not exempt an appraiser from adherence to USPAP.

The report content and level of information requirements in this Standards Rule are minimums for each type of report. An appraiser must supplement a report form, when necessary, to ensure that any intended user of the appraisal is not misled and that the report complies with the applicable content requirements.

(a) The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(viii) summarize the scope of work used to develop the appraisal;¹²

Comment: Summarizing the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, summarize the type and extent of the inspection(s). In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

Footnote ¹²: See Advisory Opinion 28, *Scope of Work Decision, Performance, and Disclosure*, and Advisory Opinion 29, *An Acceptable Scope of Work*.

(b) The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(x) state the scope of work used to develop the appraisal;¹³

Comment: Stating the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, state the type and extent of inspection(s) performed. In instances where an

inspection was not performed as part of the scope of work, state that no inspection was performed.

Footnote ¹³: See Advisory Opinion 28, *Scope of Work Decision, Performance, and Disclosure*, and Advisory Opinion 29, *An Acceptable Scope of Work*.

Standards Rule 4-2, CONTENT OF AN APPRAISAL REVIEW REPORT

The content of an appraisal review report must be appropriate for the intended use of the appraisal review and, at a minimum:

(g) state the scope of work used to develop the appraisal review;¹⁴

Comment: Stating the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, summarize the type and extent of the inspection(s). In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

Footnote ¹⁴: See Advisory Opinion 28, *Scope of Work Decision, Performance, and Disclosure*, and Advisory Opinion 29, *An Acceptable Scope of Work*.

Standards Rule 6-2, CONTENT OF A MASS APPRAISAL REPORT

The content of a mass appraisal report must be appropriate for the intended use of the appraisal and, at a minimum:

(g) summarize the scope of work used to develop the appraisal, and explain the exclusion of the sales comparison approach, cost approach, or income approach;¹⁵

Comment: Summarizing the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, summarize the type and extent of the inspection(s). In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

Footnote ¹⁵: See Advisory Opinion 28, *Scope of Work Decision, Performance, and Disclosure*, and Advisory Opinion 29, *An Acceptable Scope of Work*.

Standards Rule 8-2, CONTENT OF A PERSONAL PROPERTY APPRAISAL REPORT

Each written personal property appraisal report must be prepared under one of the following options and prominently state which option is used: Appraisal Report or Restricted Appraisal Report.

An appraiser may use any other label in addition to, but not in place of, the labels set forth in this Standards Rule for the type of report provided. The use of additional labels such as analysis, consultation, evaluation, study, or valuation does not exempt an appraiser from adherence to USPAP.

The report content and level of information requirements in this Standards Rule are minimums for each type of report.

(a) The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(viii) summarize the scope of work used to develop the appraisal;¹⁶

Comment: Summarizing the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, summarize the type and extent of the inspection(s). In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

Footnote ¹⁶: See Advisory Opinion 28, *Scope of Work Decision, Performance, and Disclosure*, and Advisory Opinion 29, *An Acceptable Scope of Work*.

(b) The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(x) state the scope of work used to develop the appraisal;¹⁷

Comment: Stating the scope of work includes disclosure of research and analyses performed and might also include disclosure of research and analyses not performed.

When an inspection(s) was performed as part of the scope of work, state the type and extent of inspection(s) performed. In instances where an inspection was not performed as part of the scope of work, state that no inspection was performed.

305 Footnote ¹⁷: See Advisory Opinion 28, *Scope of Work Decision, Performance,*
306 *and Disclosure*, and Advisory Opinion 29, *An Acceptable Scope of Work*.

Appendix 4: TRANSFERS AND SALES

Standards Rule 1-5, SALE AGREEMENTS, OPTIONS, LISTINGS, ~~AND PRIOR SALES,~~ AND OTHER TRANSFERS

When the value opinion to be developed is market value, an appraiser must, if such information is available to the appraiser in the normal course of business:

- (a) analyze all agreements of sale, options, and listings of the subject property current as of the effective date of the appraisal; and
- (b) analyze all sales and other transfers of the subject property that occurred within the three (3) years prior to the effective date of the appraisal.

Standards Rule 2-2, CONTENT OF A REAL PROPERTY APPRAISAL REPORT

Each written real property appraisal report must be prepared under one of the following options and prominently state which option is used: Appraisal Report or Restricted Appraisal Report.

An appraiser may use any other label in addition to, but not in place of, the labels set forth in this Standards Rule for the type of report provided. The use of additional labels such as analysis, consultation, evaluation, study, or valuation does not exempt an appraiser from adherence to USPAP.

The report content and level of information requirements in this Standards Rule are minimums for each type of report. An appraiser must supplement a report form, when necessary, to ensure that any intended user of the appraisal is not misled and that the report complies with the applicable content requirements.

- (a) The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:
 - (x) provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 1 by:
 - (1) summarizing the appraisal methods and techniques employed;
 - (2) stating the reasons for excluding the sales comparison, cost, or income approach(es) if any have not been developed;
 - (3) summarizing the results of analyzing the subject sales and other transfers, agreements of sale, options, and listings in accordance with Standards Rule 1-5;

Comment: If such information is unobtainable, a statement on the efforts undertaken by the appraiser to obtain the information is required. If such information is irrelevant, a statement acknowledging the existence of the information and citing its lack of relevance is required.

(b) The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(xii) provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 1 by:

(1) stating the appraisal methods and techniques employed;

(2) stating the reasons for excluding the sales comparison, cost, or income approach(es) if any have not been developed;

(3) summarizing the results of analyzing the subject sales and other transfers, agreements of sale, options, and listings in accordance with Standards Rule 1-5; and

Comment: If such information is unobtainable, a statement on the efforts undertaken by the appraiser to obtain the information is required. If such information is irrelevant, a statement acknowledging the existence of the information and citing its lack of relevance is required.

Standards Rule 7-5, SALE AGREEMENTS, OPTIONS, LISTINGS, ~~AND PRIOR SALES,~~ AND OTHER TRANSFERS

When necessary for credible assignment results, an appraiser must, if such information is available to the appraiser in the normal course of business:

(a) analyze all agreements of sale, validated offers or third-party offers to sell, options, and listings of the subject property current as of the effective date of the appraisal if warranted by the intended use of the appraisal; and

(b) analyze all prior sales and other transfers of the subject property that occurred within a reasonable and applicable time period if relevant given the intended use of the appraisal and property type.

Standards Rule 8-2(a)(x)(3), CONTENT OF A PERSONAL PROPERTY APPRAISAL REPORT

Each written personal property appraisal report must be prepared under one of the following options and prominently state which option is used: Appraisal Report or Restricted Appraisal Report.

An appraiser may use any other label in addition to, but not in place of, the labels set forth in this Standards Rule for the type of report provided. The use of

additional labels such as analysis, consultation, evaluation, study, or valuation does not exempt an appraiser from adherence to USPAP.

The report content and level of information requirements in this Standards Rule are minimums for each type of report.

(a) The content of an Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(x) provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 7 by:

(1) summarizing the appraisal methods or techniques employed;

(2) stating the reasons for excluding the sales comparison, cost, or income approach(es) if any have not been developed;

(3) summarizing the results of analyzing the subject property's sales and other transfers, agreements of sale, options, and listings when, in accordance with Standards Rule 7-5, it was necessary for credible assignment results and if such information was available to the appraiser in the normal course of business;

Comment: If such information is unobtainable, a statement on the efforts undertaken by the appraiser to obtain the information is required. If such information is irrelevant, a statement acknowledging the existence of the information and citing its lack of relevance is required.

(b) The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(xiii) provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 1 by:

(1) stating the appraisal methods and techniques employed;

(2) stating the reasons for excluding the sales comparison, cost, or income approach(es) if any have not been developed;

(3) summarizing the results of analyzing the subject sales and other transfers, agreements of sale, options, and listings in accordance with Standards Rule 1-5; and

Comment: If such information is unobtainable, a statement on the efforts undertaken by the appraiser to obtain the information is required. If such

399 information is irrelevant, a statement acknowledging the existence of the
400 information and citing its lack of relevance is required.

Standards Rule 9-4(b), APPROACHES TO VALUE

- 401 **(b) An appraiser must, when necessary for credible assignment results,**
402 **analyze the effect on value, if any, of:**
- 403 **(i) the nature and history of the business enterprise or intangible asset;**
 - 404 **(ii) financial and economic conditions affecting the business enterprise or**
405 **intangible asset, its industry, and the general economy;**
 - 406 **(iii) past results, current operations, and future prospects of the business**
407 **enterprise**
 - 408 **(iv) past sales and other transfers of capital stock or other ownership**
409 **interests in the business enterprise or intangible asset being**
410 **appraised;**
 - 411 **(v) sales and other transfers of capital stock or other ownership interests**
412 **in similar business enterprises;**
 - 413 **(vi) prices, terms, and conditions affecting past sales and other transfers**
414 **of similar ownership interests in the asset being appraised or a similar**
415 **asset; and**
 - 416 **(vii) economic benefit of tangible and intangible assets.**
- 417 Comment on (i)-(vii): This Standards Rule directs the appraiser to study the
418 prospective and retrospective aspects of the business enterprise in terms of the
419 economic and industry environment within which it operates.

Appendix 5: DEFINITIONS TO RETIRE

Definition of Misleading

420 ~~**MISLEADING:** Intentionally or unintentionally misrepresenting, misstating, or~~
 421 ~~concealing relevant facts or conclusions.~~

Definition of Relevant Characteristics

422 ~~**RELEVANT CHARACTERISTICS:** features that may affect a property's value or~~
 423 ~~marketability such as legal, economic, or physical characteristics.~~

Definition of Personal Inspection

424 ~~**PERSONAL INSPECTION:** a physical observation performed to assist in identifying~~
 425 ~~relevant property characteristics in a valuation service.~~

426 ~~Comment: An appraiser's inspection is typically limited to those things readily~~
 427 ~~observable without the use of special testing or equipment. Appraisals of some~~
 428 ~~types of property, such as gems and jewelry, may require the use of specialized~~
 429 ~~equipment. An inspection by an appraiser is not the equivalent of an inspection~~
 430 ~~by an inspection professional (e.g., a structural engineer, home inspector, or art~~
 431 ~~conservator).¹⁸~~

432 ~~Footnote ¹⁸. See Advisory Opinion 2, *Inspection of Subject Property*~~

Appendix 6: DEFINITIONS TO MODIFY

Definition of Appraiser

APPRAISER: one who is expected to perform valuation services competently and in a manner that is independent, impartial, and objective.

Comment: Such expectation occurs when individuals, either by choice or by requirement placed upon them or upon the service they provide by law, regulation, or agreement with the client or intended users, represent that they comply.¹⁹

Footnote ¹⁹: See PREAMBLE and Advisory Opinion 21, USPAP Compliance.

Definition of Assignment Elements

ASSIGNMENT ELEMENTS: specific information needed to identify the appraisal or appraisal review problem: ~~client and any other intended users; intended use of the appraiser's opinions and conclusions; type and definition of value; effective date of the appraiser's opinions and conclusions; subject of the assignment and its relevant characteristics; and assignment conditions.~~

Definition of Workfile

WORKFILE: ~~data, information, and documentation necessary to support the appraiser's opinions and conclusions and to show compliance with USPAP.²⁰~~

Footnote ²⁰: See RECORD KEEPING RULE.

Appendix 7: DEFINITIONS TO ADD

Definition of His or Her

448 **HIS OR HER:** Traditional gender-related pronouns, such as “he”, “his”, “him”, “himself”,
449 or “she”, “her” or “herself”, are to be construed as gender neutral and include persons
450 who identify themselves as non-binary, e.g., agender, bigender.

Appendix 8: MINOR EDITS

Minor change in 2-3, 4-3, 6-3, 8-3, and 10-3

Standards Rule 2-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(c) When a signing appraiser has relied on work done by appraisers and others who do not sign the certification, the signing appraiser is responsible for the decision to rely on their work.

(i) The signing appraiser is required to have a reasonable basis for believing that those individuals performing the work are competent; and

(ii) The signing appraiser must have no reason to doubt that the work of those individuals is credible.

Comment: Although a certification must contain the names of individuals providing significant real property appraisal assistance, it is not required that ~~a summary~~ the description of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report.

Standards Rule 4-3, CERTIFICATION

A signed certification is an integral part of the appraisal review report.

(c) When a signing appraiser has relied on work done by appraisers and others who do not sign the certification, the signing appraiser is responsible for the decision to rely on their work.

(iii) The signing appraiser is required to have a reasonable basis for believing that those individuals performing the work are competent; and

(iv) The signing appraiser must have no reason to doubt that the work of those individuals is credible.

Comment: Although a certification must contain the names of individuals providing significant appraisal or appraisal review assistance, it is not required that ~~a summary~~ the description of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report.

Standards Rule 6-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(c) When a signing appraiser has relied on work done by appraisers and others who do not sign the certification, the signing appraiser is responsible for the decision to rely on their work.

(i) The signing appraiser is required to have a reasonable basis for believing that those individuals performing the work are competent; and

(ii) The signing appraiser must have no reason to doubt that the work of those individuals is credible.

Comment: Although a certification must contain the names of individuals providing significant mass appraisal assistance, it is not required that ~~a summary~~ the description of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report.

Standards Rule 8-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(c) When a signing appraiser has relied on work done by appraisers and others who do not sign the certification, the signing appraiser is responsible for the decision to rely on their work.

(i) The signing appraiser is required to have a reasonable basis for believing that those individuals performing the work are competent; and

(ii) The signing appraiser must have no reason to doubt that the work of those individuals is credible.

Comment: Although a certification must contain the names of individuals providing significant personal property appraisal assistance, it is not required that ~~a summary~~ the description of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report.

Standards Rule 10-3, CERTIFICATION

A signed certification is an integral part of the appraisal report.

(c) When a signing appraiser has relied on work done by appraisers and others who do not sign the certification, the signing appraiser is responsible for the decision to rely on their work.

(i) The signing appraiser is required to have a reasonable basis for believing that those individuals performing the work are competent; and

(ii) The signing appraiser must have no reason to doubt that the work of those individuals is credible.

Comment: Although a certification must contain the names of individuals providing significant business and/or intangible asset appraisal assistance, it is not required that ~~a summary~~ the description of the extent of their assistance be located in a certification. This disclosure may be in any part(s) of the report.

Minor change in STANDARD 6

In reporting the results of a mass appraisal, an appraiser must communicate each analysis, opinion, and conclusion in writing and in a manner that is not misleading.

Comment: STANDARD 6 addresses the content and level of information required in a report that communicates the results of a mass appraisal.

STANDARD 6 does not dictate the form, format, or style of mass appraisal reports. The substantive content of a report determines its compliance.

Minor change in Standards Rule 8-2(b)(xiii)(3)

Standards Rule 8-2, CONTENT OF A PERSONAL PROPERTY APPRAISAL REPORT

Each written appraisal report for an interest in a business enterprise or intangible asset must be prepared in accordance with one of the following options and prominently state which option is used: Appraisal Report or Restricted Appraisal Report.

An appraiser may use any other label in addition to, but not in place of, the labels set forth in this Standards Rule for the type of report provided. The use of additional labels such as analysis, consultation, evaluation, study, or valuation does not exempt an appraiser from adherence to USPAP.

The report content and level of information requirements in this Standards Rule are minimums for both types of report.

(b) The content of a Restricted Appraisal Report must be appropriate for the intended use of the appraisal and, at a minimum:

(xiii) provide sufficient information to indicate that the appraiser complied with the requirements of STANDARD 7 by:

- (1) stating the appraisal methods and techniques employed;
- (2) stating the reasons for excluding the sales comparison, cost, or income approach(es) if any have not been developed;
- (3) summarizing the results of analyzing the subject property's sales and other transfers, agreements of sale, options, and listings when, in accordance with Standards Rule 7-5, it was necessary for credible assignment results and if such information was available to the appraiser in the normal course of business; and

Comment: If such information is unobtainable, a statement on the efforts undertaken by the appraiser to obtain the information is required. If such information is irrelevant, a statement acknowledging the existence of the information and citing its lack of relevance is required.