

**PUBLIC MEETING OF THE NEBRASKA REAL PROPERTY APPRAISER BOARD**  
**Thursday, April 17, 2025, 9:00 a.m.**  
**Nebraska Real Property Appraiser Board Office, First Floor, Nebraska State Office Building**  
**301 Centennial Mall South, Lincoln, Nebraska**

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Swearing in of new Board Member Adam Batie will take place prior to the start of the meeting at 8:45 a.m.

**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 10:15 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 Appraiser** ..... 1-24

- 1. New Applicants for Certified Residential Credential through Education, Experience, and Examination
  - a. CR24011
  - b. CR25002
- 2. Pending Applications
  - a. CG23036
  - b. CG24001
  - c. CG24020

**D. Registration as an Appraisal Management Company**

**E. Compliance Matters** ..... 1

- 1. Active Investigations
  - a. 25-03

**F. Other Executive Session Items** ..... 1-9

- 1. General
  - a. 2025.04
  - b. 2025.06
  - c. 2025.07
- 2. Personnel

**G. Welcome and Chair’s Remarks (Public Agenda 10:15 a.m.)**

**H. Board Meeting Minutes**

- 1. Approval of March 20, 2025 Meeting Minutes ..... 1-14

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b. 2202429.02: Appraisal Institute – “Using Spreadsheet Programs in Real Estate Appraisals – Synchronous”	
<b>M. Unfinished Business</b>	
<b>N. New Business</b>	
<b>O. Legislative Report and Business</b>	
1. 109th Legislature (1st Regular Session) Bills of NRPAB Interest	1-8
2. Adopted Changes to Title 298 of the Administrative Code	
3. Other Legislative Matters	

**P. Administrative Business**

- 1. Guidance Documents
- 2. Internal Procedural Documents
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  - b. 201709: Appraisal Review Services Contractor Fees ..... 2
- 3. Forms, Applications, and Procedures
- 4. Real Property Appraiser Applicant Experience Review Subcommittee Assignments
  - a. 2025A
  - b. 2025B
  - c. 2025C
  - d. 2025D
  - e. 2025E
  - f. 2025F

**Q. Other Business**

- 1. Board Meetings
- 2. Conferences/Education
- 3. Memos from the Board
- 3. Quarterly Newsletter
  - a. Spring 2025 Edition of The Nebraska Appraiser ..... 1-9
- 4. Appraisal Subcommittee
  - a. ASC Compliance Review
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  - a. Fannie Mae
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**R. Adjourn**

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

**March 20, 2025 Meeting Minutes**

**A. OPENING**

Chairperson Gerdes called to order the March 20, 2025 meeting of the Nebraska Real Property Appraiser Board at 9:01 a.m. by virtual conferencing 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 Gerdes 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](http://www.nebraska.gov) on March 13, 2025. 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/](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 Cody Gerdes of Lincoln, Nebraska; Kevin Hermsen of Gretna, Nebraska; Rodney Johnson of Norfolk, Nebraska; and Derek Minshull of North Platte, Nebraska were present. Also present were Director Tyler Kohtz, Licensing Programs Manager Karen Loll, Education Program Manager Kashinda Sims, and Business Programs Manager Colby Falls, who are headquartered in Lincoln, Nebraska.

**ADOPTION OF THE AGENDA**

Chairperson Gerdes reminded those present for the meeting that the agenda cannot be altered twenty-four hours prior to the meeting except for emergency items in accordance with the Open Meetings Act. Director Kohtz announced that agenda item C.2, “New Applicants for Certified General Credential through Education, Experience and Examination,” is incorrectly identified as CR24020 on the agenda; the correct Identifier is CG24020. The Director added that the identification is correct in all other materials for the meeting. Chairperson Gerdes requested clarification regarding the change. Director Kohtz indicated that “CR” should be “CG.” The Director was asked if the number changed. Director Kohtz responded, “No, only the letters changed. The correct identification number is CG24020.” Chairperson Gerdes acknowledged the correction, “CR24040” should be shown on the agenda as “CG24020,” and asked for a motion to adopt the agenda. Board Member Minshull moved to adopt the agenda as corrected with item C.2 as CG24020. Board Member Hermsen seconded the motion. With no further discussion, the motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

Board Member Hermsen moved that the Board go into executive session for the purpose of reviewing applicants for credentialing; applications for appraisal management company registration; investigations; pending litigation, or litigation which is imminent as evidenced by communication of claim or threat of litigation; and employee performance evaluation. A closed session is clearly necessary to prevent needless injury to the reputation to those involved. Board Member Minshull seconded the motion. The time on the meeting clock was 9:06 a.m. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

Board Member Johnson moved to come out of executive session at 10:12 a.m. Board Member Minshull seconded the motion. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

Break from 10:12 a.m. to 10:22 a.m.

#### **G. WELCOME AND CHAIR'S REMARKS**

Chairperson Gerdes welcomed all to the March 20, 2025 meeting of the Nebraska Real Property Appraiser Board. The Chairperson highlighted the recent appointment of Adam Batie to the Board and indicated that Board Member Batie's first meeting will be on April 17, 2025. Chairperson Gerdes proceeded to thank former Board Member Downing for her leadership and contributions to the Board over the course of her term. The Chairperson then recognized Chase Nelms, John Ferris, and Emma Loseke as members of the public in attendance in person, and recognized David Bloxham, Wendy McCormick, along with ASC Program Mangers Jonathan Stewart and Tom Lewis, as members of the public in attendance via virtual conferencing.

#### **H. BOARD MEETING MINUTES**

Chairperson Gerdes asked for any additions or corrections to the February 20, 2025 meeting minutes. With no discussion, Chairperson Gerdes called for a motion. Board Member Hermsen moved to approve the February 20, 2025 meeting minutes as presented. Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no discussion, Chairperson Gerdes called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes 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 real property appraisers as of March 20, 2025 to the Board for review. The Director reported that trends are stable and indicated that he had no specific comments. Director Kohtz asked for any questions or comments. There was no further discussion.

**b. Temporary Real Property Appraiser Report**

Director Kohtz presented three charts outlining the number of temporary credentials issued as of February 28, 2025 to the Board for review. The Director indicated that he had no specific comments on this report and asked for any questions or comments. Chairperson Gerdes asked for clarification as to why the number of temporary credentials is so low for EY 2025 on the “Temporary Real Property Appraiser Credentials Issued by Calendar Year – Five Year Trend” report. The Chairperson then speculated that it is due to the report being based on the calendar year and this being the beginning of the year. Director Kohtz confirmed Chairperson Gerdes’ speculation to be true. There was no further discussion.

**c. Supervisory Real Property Appraiser Report**

The Director presented two charts outlining the number of registered supervisory real property appraisers as of March 20, 2025 to the Board for review. The Director reported that trends are stable and indicated that he had no specific comments. Director Kohtz asked for any questions or comments. There was no further discussion.

**d. Appraisal Management Company Report**

Director Kohtz presented two charts outlining the number of AMCs as of March 20, 2025 to the Board for review. The Director noted a stable trend and asked for any questions or comments. There was no further 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 for the period between February 13, 2025 and March 11, 2025. The Director indicated that he had no specific comments and asked for any questions or comments. There was no further discussion.

**b. Education Activity and Instructors Report**

Director Kohtz presented the Education Activities and Instructors Report to the Board for review showing education activities and instructors approved by the Director for the period between February 13, 2025 and March 11, 2025. Director Kohtz asked for any questions or comments. There was no further discussion.

### **3. 2024-25 NRPAB GOALS AND OBJECTIVES + SWOT ANALYSIS**

Director Kohtz presented the 2024-25 NRPAB Goals and Objectives and SWOT Analysis to the Board for review and provided a status update. The Director brought attention to the goal to adopt Title 298 changes to harmonize Title 298 with the changes made to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act in 2024, address the Board's PAVE Dashboard regulations review, add fee schedule, and incorporate changes made to the Real Property Appraiser Qualification Criteria Effective January 1, 2026 and CAP Guidelines effective September 17, 2023 under the Laws, Rules, and Guidance Documents section and reported that the adopted Title 298 changes have been submitted to Governor Pillen, the Attorney General's Office, and Executive Board of the Legislature. The Director then turned attention to the goal to explore use of Federal grant money for development of online temporary real property appraiser credential application and NRPAB Database interface under the Administration section and informed the Board that this goal was completed on February 25, 2025. The Director asked for any questions or comments. There was no further discussion.

## **J. FINANCIAL REPORT AND CONSIDERATIONS**

### **1. FEBRUARY FINANCIAL REPORT**

The receipts and expenditures for February were presented to the Board for review in the agency Budget Status Report. The Director informed the Board that he had no comments on any specific expenditures in February. Director Kohtz then reported that the overall expenditures for the month of February totaled \$30,480.50, and the year-to-date overall expenditures for the fiscal year are \$286,846.92 which amounts to 55.52 percent of the budgeted expenditures for the fiscal year; 66.58 percent of the fiscal year has passed.

Next, the Director informed the Board that he had no comments on any specific revenues in February. According to Director Kohtz, the overall revenues for the month of February totaled \$12,692.81, and the year-to-date overall revenues for the fiscal year are \$327,386.21, which amounts to 87.07 percent of the projected revenues for the fiscal year. The Director reiterated that 66.58 percent of the fiscal year has passed.

Director Kohtz then moved to the Budget Status Report for the Appraiser Fund and AMC Fund and informed the Board that he would make no comments on any specific expenditures or revenues unless requested by the Board. The Director reported that the Real Property Appraiser Fund expenditures for the month of February totaled \$20,304.33, and the year-to-date expenditures for the fiscal year are \$190,971.93, which amounts to 54.52 percent of the budgeted expenditures for the fiscal year. The Real Property Appraiser Fund revenues were \$6,499.48 for February, and the year-to-date revenues for the fiscal year are \$240,949.99, which amounts to 92.03 percent of the projected revenue for the fiscal year. Director Kohtz then reported that the AMC Fund expenditures for the month of February totaled \$10,176.17, and the year-to-date expenditures for the fiscal year are \$95,874.99, which amounts to 57.64 percent of the budgeted expenditures for the fiscal year.

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The AMC Fund revenues were \$6,193.33 for February, and the year-to-date revenues for the fiscal year are \$86,436.22, which amounts to 75.71 percent of projected revenue for the fiscal year. The Director asked for any questions or comments on the Budget Status Reports. There was no further discussion.

Director Kohtz presented the MTD General Ledger Detail report for the month of February and stated that he had no specific comments. The Director asked for any questions or comments on the MTD General Ledger Detail report. There was no further discussion.

Director Kohtz finished by presenting four graphs showing expenses, revenues, and cash balances. The Director noted overall expenditures of \$30,480.50, and revenues of \$12,692.81, for the month of February for the Real Property Appraiser Program, which includes both the Appraiser Fund and the AMC Fund. Director Kohtz brought the Board's attention to the NRPAB Twenty-Five Month Expenses/Revenues by Program and once again reported that the Real Property Appraiser Fund expenditures totaled \$20,304.33, the Real Property Appraiser Fund revenues totaled \$6,499.48, the AMC Fund expenditures totaled \$10,176.17, and the AMC Fund revenues totaled \$6,193.33. The Director then stated that the cash balance for the AMC Fund is \$312,065.56, the cash balance for the Appraiser Fund is \$445,232.19, and the overall cash balance for both funds is \$757,297.75. Director Kohtz asked for any questions or comments on the graphs. There was no further discussion.

Board Member Johnson moved to place the February financial reports on file for audit. Board Member Hermsen seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no discussion, Chairperson Gerdes called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

2. **2025-2027 BIENNIAL BUDGET UPDATE:** No discussion.
3. **ASC GRANT REPORT:** No discussion.
4. **PER DIEMS:** No discussion.



## **K. GENERAL PUBLIC COMMENTS**

Chairperson Gerdes asked for any public comments. John Farris appeared before the Board and introduced himself, Chase Nelms, and Emma Loseke as representatives from Farm Credit Services of America. Farris expressed his appreciation for the Board’s work and thanked the Board for providing the opportunity for his team to attend the meeting. Chairperson Gerdes thanked Farris for the support. Director Kohtz asked if any of the public members attending via virtual conferencing had any public comments. David Bloxham appeared before the Board and thanked the Board for allowing him to join the public session via virtual conferencing on behalf of the Rocky Mountain Appraiser Association. Bloxham informed the Board that it will be reviewing an Application for Approval as a Continuing Education Activity later in the meeting and offered to make himself available for questions during the Board’s discussion if needed. Chairperson Gerdes thanked Bloxham for the offer. Director Kohtz then noted that Mr. Bloxham is a former board member. The Board acknowledged this statement. The Chairperson then asked for any other comments. With no other comments, Chairperson Gerdes moved on to Education.

## **L. EDUCATION**

### **1. NEW CONTINUING EDUCATION ACTIVITY APPLICATIONS**

#### **a. 2253410.88: Rocky Mountain Appraiser Association - “Property Taxes: Past, Present, and Practice”**

EPM Sims presented an Agenda Item Summary to the Board concerning the Rocky Mountain Appraiser Association’s Application for Approval as a Continuing Education Activity in Nebraska for the activity titled, “Property Taxes: Past, Present, and Practice” received on March 11, 2025. According to Sims, upon review of the student and instructor materials used for the activity, it is unclear as to whether the materials contribute to a credential holder’s development of real property appraiser related skill, knowledge, and competency. The calculated timed outline for the activity totals two (2) hours in accordance with 298 NAC Chapter 6, §003.01B. All other requirements for approval have been met. On March 15, 2025, JoAnn Apostol, representative of Rocky Mountain Appraiser Association, emailed the Board in response to the notice that this activity was being placed before the Board for consideration. Apostol brought attention to the fact that the Real Property Appraiser Qualification Criteria allows for ad valorem taxation as a topic. Director Kohtz informed the Board that staff was not comfortable approving this activity without Board review as ad valorem tax appraisal is an exempt activity in Nebraska. In addition, part of the course covers tax rate calculation. The Director then indicated that up to twenty-five (25) percent of real property appraisal practice experience may be mass appraisal, and this information may be beneficial to those that do tax appeal appraisal work.

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Board Member Hermesen noted that the activity content appears to be specific to Colorado. Chairperson Gerdes questioned how general in nature the curriculum is. Chairperson Gerdes asked if David Bloxham with the Rocky Mountain Appraiser Association would appear before the Board. Bloxham was asked if the course would help appraisers understand taxation differences between states. Bloxham responded that the material is general in nature but does use Colorado laws as a baseline for comparison. This activity would benefit any appraiser that does tax appeal work, especially near the Nebraska-Colorado border. One of the major goals of the Rocky Mountain Appraiser Association is to make live continuing education available to those on the Western slope. Chairperson Gerdes thanked Bloxham for the information and for developing synchronous activities for the benefit Nebraska appraisers. After additional discussion, the Board agreed that this activity would contribute to an appraiser's development of appraiser related skill, knowledge, and competency in real property appraisal practice; valuation methodology and/or techniques; real property concepts, characteristics, and analysis; and real estate law, easements, and legal interests. Chairperson Gerdes called for a motion. Board Member Hermesen moved to approve the Rocky Mountain Appraiser Association activity, "Property Taxes: Past, Present, And Practice" (2253410.88). Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no further discussion, Chairperson Gerdes called for a vote. The motion carried with Hermesen, Johnson, Minshull, and Gerdes voting aye.

Bloxham thanked the Board for approval of the education activity and informed the Board that the provider would consider the requirements for Nebraska credential holders moving forward. EPM Sims notified Bloxham that the Rocky Mountain Appraiser Association would receive a notice of approval of the education activity shortly after the closing of the meeting. There was no further discussion.

## **2. RESCISSION OF APPROVAL OF EDUCATION ACTIVITIES**

### **a. 2152438.03: McKissock - "Avoiding Mortgage Fraud for Appraisers"**

EPM Sims presented an Agenda Item Summary to the Board concerning the Appraiser eLearning activity titled, "Avoiding Mortgage Fraud for Appraisers" (Activity #2152438.03). Andrea Ledford with Appraiser eLearning indicated in an email that the provider stopped offering the activity in 2022 and requested that the Board rescind approval of the activity. The activity, which was originally approved on August 20, 2015, is currently set to expire on August 20, 2025. Staff recommended rescinding approval of the activity. Chairperson Gerdes asked for any discussion. With none, Chairperson Gerdes called for a motion. Board Member Hermesen moved to rescind approval of the Appraiser eLearning activity titled, "Avoiding Mortgage Fraud for Appraisers" (2152438.03), as requested by the education provider. Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no further discussion, Chairperson Gerdes called for a vote. The motion carried with Hermesen, Johnson, Minshull, and Gerdes voting aye.

## **M. UNFINISHED BUSINESS**

### **1. OPEN 3RD CONGRESSIONAL DISTRICT CERTIFIED REAL PROPERTY APPRAISER REPRESENTATIVE**

Director Kohtz informed the Board that he was notified on Monday that Adam Batie was appointed by Governor Pillen on March 11, 2025 as the Board's new 3rd congressional district certified real property appraiser representative. The Director indicated that Board Member Batie will be sworn in for the April 17, 2025 meeting. Director Kohtz asked for any questions or comments. There was no further discussion.

## **N. NEW BUSINESS**

### **1. APPRAISAL SUBCOMMITTEE COMPLIANCE REVIEW REPORT**

Director Kohtz reported to the Board he received the ASC Staff Preliminary Compliance Review Findings of the Nebraska Appraiser Program and ASC Staff Preliminary Compliance Review Findings of the Nebraska AMC Program. The Director informed the Board that all areas were found to be in compliance. Director Kohtz thanked staff for its hard work preparing for the compliance review. The Director then introduced Program Manager Stewart and Program Manager Lewis and thanked them for their review of the Board's programs. P.M. Stewart expressed his gratitude for the staff's accommodation, attention to detail, and organization, and thanked Director Kohtz for his hard work. P.M. Stewart then mentioned that, as a former regulator, he understands the stress that a compliance review can have on an agency. P.M. Stewart finished by informing the Board that the program is well run and that he looks forward to continuing to work with the staff in the future. Chairperson Gerdes thanked P.M. Stewart and P.M. Lewis for their time and the report.

## **O. LEGISLATIVE REPORT AND BUSINESS**

### **1. 109<sup>TH</sup> LEGISLATURE (1ST REGULAR SESSION) BILLS OF NRPAB INTEREST**

Director Kohtz presented the second legislative report for the current session to the Board for review. The Director informed the Board that he will only provide a summary on those bills that have notable changes and reminded the Board to inform him if any discussion is needed on any of the bills not summarized. The following bills were discussed:

**LB139** - The Director reported that LB139 was signed by Governor Pillen on March 11, 2025.

**LB295** - The Director reported that LB295 was placed on General File with AM404. AM404 strikes original Section 18 and adds Section 5 to clarify the states contribution to the retirement system from the General Fund and makes non-substantial changes to correct language issues.

**LB634** - The Director reported that the Executive Board of the Legislature named LB634 as a priority bill.

**2. ADOPTED CHANGES TO TITLE 298 OF THE ADMINISTRATIVE CODE**

Director Kohtz informed the Board that the Title 298 changes adopted by the Board on February 20, 2025 have been submitted to Governor Pillen, the Attorney General’s Office, and Executive Board of the Legislature for approval. The Attorney General’s Office approved the adopted Title 298 changes on March 14, 2025. There was no further discussion.

**3. OTHER LEGISLATIVE MATTERS:** No discussion.

**P. ADMINISTRATIVE BUSINESS**

**1. GUIDANCE DOCUMENTS:** No discussion.

**2. INTERNAL PROCEDURAL DOCUMENTS:** No discussion.

**3. FORMS, APPLICATIONS, AND PROCEDURES**

**a. NRPAB EMPLOYEE HANDBOOK**

Director Kohtz presented the updated document titled, “NRPAB Employee Handbook” to the Board for consideration. The Director informed the Board that changes were made to harmonize the language with the 2025-2027 NAPE/AFSCME Labor Contract, incorporate updated State Personnel policies, and make general updates. Director Kohtz indicated that he would present the non-contract and non-State Personnel related changes individually. The Director then guided the Board to page P.5 and informed the Board that the positions information was updated to reflect the current staff makeup. Director Kohtz then moved to page P.30 and indicated that the language regarding the clothing allowance was removed as this is no longer funded in the budget. Chairperson Gerdes asked for any discussion. With none, Chairperson Gerdes called for a motion. Board Member Minshull moved to approve the NRBAP Employee Handbook as presented. Board Member Johnson seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no discussion, Chairperson Gerdes called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

**b. NRPAB STATE OF NEBRASKA EXPENSE REIMBURSEMENT POLICIES**

Director Kohtz presented the updated document titled, “NRPAB State of Nebraska Expense Reimbursement Policies” to the Board for consideration. The Director informed the Board that changes were made to implement State Accounting Manual changes. Chairperson Gerdes asked for any discussion. With none, Chairperson Gerdes called for a motion. Board Member Hermsen moved to approve the NRPAB State of Nebraska Expense Reimbursement Policies as presented. Board Member Johnson seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no discussion, Chairperson Gerdes called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

**c. AMC FORMS AND APPLICATIONS**

Director Kohtz presented the updated documents titled, "Application for Nebraska Appraisal Management Company Registration," "Application for Renewal of Nebraska Appraisal Management Company Registration," "Federally Regulated Appraisal Management Company Nebraska Reporting Form," and "Nebraska Appraisal Management Company Information Change Form" to the Board for consideration. The Director informed the Board the applications were updated at the request of the ASC program managers, to remove the terms "Single State" and "Multi-State" as these terms are not recognized by the ASC. Director Kohtz then guided the Board to page P.53 and informed the Board that language was added to the directions for fingerprint cards at the request of the Nebraska State Patrol. Finally, the Director indicated that the mailing address on this page was updated for clarification. Director Kohtz informed the Board that these changes are the same on all documents presented. Chairperson Gerdes asked for any discussion. With none, Chairperson Gerdes called for a motion. Board Member Johnson moved to approve the "Application for Nebraska Appraisal Management Company Registration," "Application for Renewal of Nebraska Appraisal Management Company Registration," "Federally Regulated Appraisal Management Company Nebraska Reporting Form," and "Nebraska Appraisal Management Company Information Change Form" as presented. Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no discussion, Chairperson Gerdes called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

**Q. OTHER BUSINESS**

**1. BOARD MEETINGS:** No discussion.

**2. CONFERENCES/EDUCATION**

**a. Spring AARO Conference; April 29, 2025 through May 1, 2025 - Virtual**

Director Kohtz reported that the Spring 2025 AARO Conference will take place April 29, 2025 through May 1, 2025 as a virtual conference. The Director informed the Board that he plans to attend with funding from the ASC SARAS Grant and requested permission to attend the conference on behalf of the Board. Chairperson Gerdes asked for any discussion. With none, Chairperson Gerdes called for a motion. Board Member Johnson moved to approve Director Kohtz's attendance of the virtual Spring 2025 AARO Conference From April 29, 2025 through May 1, 2025 utilizing the ASC SARAS Grant Funds for registration. Board Member Hermsen seconded the motion. Chairperson Gerdes recognized the motion and asked for any discussion. With no discussion, Chairperson Gerdes called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

**3. MEMOS FROM THE BOARD:** No discussion.

**4. QUARTERLY NEWSLETTER:** No discussion.

**5. APPRAISAL SUBCOMMITTEE:** No discussion.

**6. THE APPRAISAL FOUNDATION**

**a. TAF March Newsletter**

Director Kohtz presented The Appraisal Foundation's March Newsletter to the Board for review. The Director informed the Board that he had no specific comments and asked for any questions or comments. There was no further discussion.

**b. ASB USPAP Q&As March 6, 2025**

Director Kohtz presented the TAF Appraisal Standards Board document titled, "USPAP Q&As" issued on March 6, 2025 to the Board for review. The Director first brought attention to Question 2025-01 on Page Q.6 concerning using experience as support for adjustments. The question asked is, "If an appraiser is competent to perform a specific assignment, and has extensive experience in that type of assignment, can they support an adjustment for a property's proximity to a park solely based on that experience?" The answer provided by the ASB is, "No, experience cannot be a recognized method or technique or a substitute for relevant evidence and logic. Adjustments are a type of assignment result and must meet USPAP's requirements for credible assignment results."

Director Kohtz then guided the Board to Question 2025-02 on Page Q.7 concerning the development of alternative adjustments in appraisal review. The question asked is, "An appraiser performing a review assignment has developed an opinion that the work under review contains inappropriate adjustments in the sales comparison approach based on the data provided in the report. Is the reviewer required to develop and report alternate adjustments?" According to the ASB, "No. If the scope of work does not require the reviewer to develop their own opinion of value or to determine correct adjustments."

Finally, the Director moved on to Question 2025-03 on Page Q.7 concerning market rent of a short-term rental property. The question asked is, "Are appraisers required to follow Standards 1 and 2 when developing and reporting an opinion of market rent for a residential property used for short-term rental?" The answer provided by the ASB to this question is, "Yes. The amount a tenant is willing to pay for the right to use a property for a defined period reflects an opinion of value."

Director Kohtz asked for any questions or comments. There was no further discussion.

**7. ASSOCIATION OF APPRAISER REGULATORY OFFICIALS:** No discussion

**8. GOVERNMENT-SPONSORED ENTERPRISES**

**a. Frannie Mae:** No discussion.

**b. Freddie Mac**

**i. Multi-Family Bulletin M2025-1**

Director Kohtz presented the Freddie Mac Multi-Family Bulletin M2025-1 to the Board for review. The Director informed the Board that he had no specific comments and asked for any questions or comments. There was no further discussion.

**9. IN THE NEWS:** No discussion.

**C. CREDENTIALING AS A NEBRASKA REAL PROPERTY APPRAISER**

The Board reviewed applicants L24003 and CG24020. Chairperson Gerdes asked for a motion on L24003 and CG24020.

Board Member Hermsen moved to take the following action:

**L24003 / Approve to sit for exam and authorized Director to issue a credential as a licensed residential real property appraiser upon providing evidence of successful completion of the National Uniform Licensing and Certification Examination and providing the necessary fees.**

Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. Motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

Board Member Hermsen moved to take the following action:

**CG24020 / Request that the applicant amend the real property appraisal practice experience logs submitted to the Board on October 22, 2024 to provide an acceptable description of real property appraisal practice as performed by the applicant, and an acceptable scope of supervisory real property appraiser review of real property appraisal practice. The affected pages shall be signed by both the applicant and the supervisory real property appraiser, and dated by both the applicant and the supervisory real property appraiser, certifying the date on which the affected pages were amended; or, submit an additional real property appraisal practice experience log of the most recent work completed by the applicant that includes a minimum of 741 hours of experience, of which at least 287 hours shall be in nonresidential appraisal work. The amended or additional real property appraisal practice logs shall be submitted within 90 days of the date of this meeting.**

Board Member Johnson seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. Motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

**D. REGISTRATION AS AN APPRAISAL MANAGEMENT COMPANY**

The Board reviewed applicants NE2025001 and NE2023004. Chairperson Gerdes asked for a motion on NE2025001 and NE2023004.

Board Member Hermsen moved to take the following action:

**NE2025001 / Approve registration as an Appraisal Management Company.**

Board Member Johnson seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. Motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

Board Member Hermsen moved to take the following action:

**NE2023004 / Approve Application for Renewal of Nebraska Appraisal Management Company Registration. File Grievance 25-04 and open investigation for violation of Neb. Rev. Stat. 76-3216(4)(a), (b), (c).**

Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. Motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

**E. COMPLIANCE**

The Board reviewed compliance matters 25-01 and 25-02. Chairperson Gerdes asked for a motion on 25-02 and 25-01.

Board Member Hermsen moved to take the following action:

**25-02 / Dismiss with prejudice.**

Board Member Johnson seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. Motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

Board Member Hermsen moved to take the following action:

**25-01 / Execute consent agreement. Signed by Chairperson Gerdes on March 20, 2025.**

Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. Motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.



## **F. OTHER EXECUTIVE SESSION ITEMS**

### **1. General**

#### **a. 2025.04**

The Board reviewed a matter in which an education provider's Postsecondary Certificate to Recruit expired on December 31, 2024. In accordance with 298 NAC Chapter 6, § 001.04, education providers and instructors that provide real property appraiser related education in Nebraska must comply with the Nebraska Private Postsecondary Career Schools Act ("PPCS Act"), Neb. Rev. Stat. § 85-1601, et seq. Until certification is re-established by the Nebraska Department of Education, the education provider may not advertise, recruit, train, or enroll students or residents of the State of Nebraska. Board Member Hermsen moved to send a Memo From the Board to notify the real property appraiser community of the education provider's status with the Nebraska Department of Education. Board Member Johnson seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

#### **b. 2025.05**

The Board reviewed a matter in which an education provider was notified by the Nebraska Department of Education that its accreditation expired on January 1, 2025, and under the Nebraska Private Postsecondary Career Schools Act ("PPCS Act"), the school is considered to be closed. In accordance with 298 NAC Chapter 6, § 001.04, education providers and instructors that provide real property appraiser related education in Nebraska must comply with the PPCS Act, Neb. Rev. Stat. § 85-1601, et seq. Board Member Hermsen moved to send notice of the Board's intent to rescind approval of all education activities for violation of 298 NAC Chapter 6, § 001.04. Board Member Minshull seconded the motion. Chairperson Gerdes recognized the motion and called for a vote. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye.

### **2. PERSONNEL MATTERS:** No discussion.

## **R. ADJOURNMENT**

Board Member Hermsen moved to adjourn the meeting. Board Member Minshull seconded the motion. The motion carried with Hermsen, Johnson, Minshull, and Gerdes voting aye. At 11:23 a.m., Chairperson Gerdes adjourned the March 20, 2025 meeting of the Nebraska Real Property Appraiser Board.

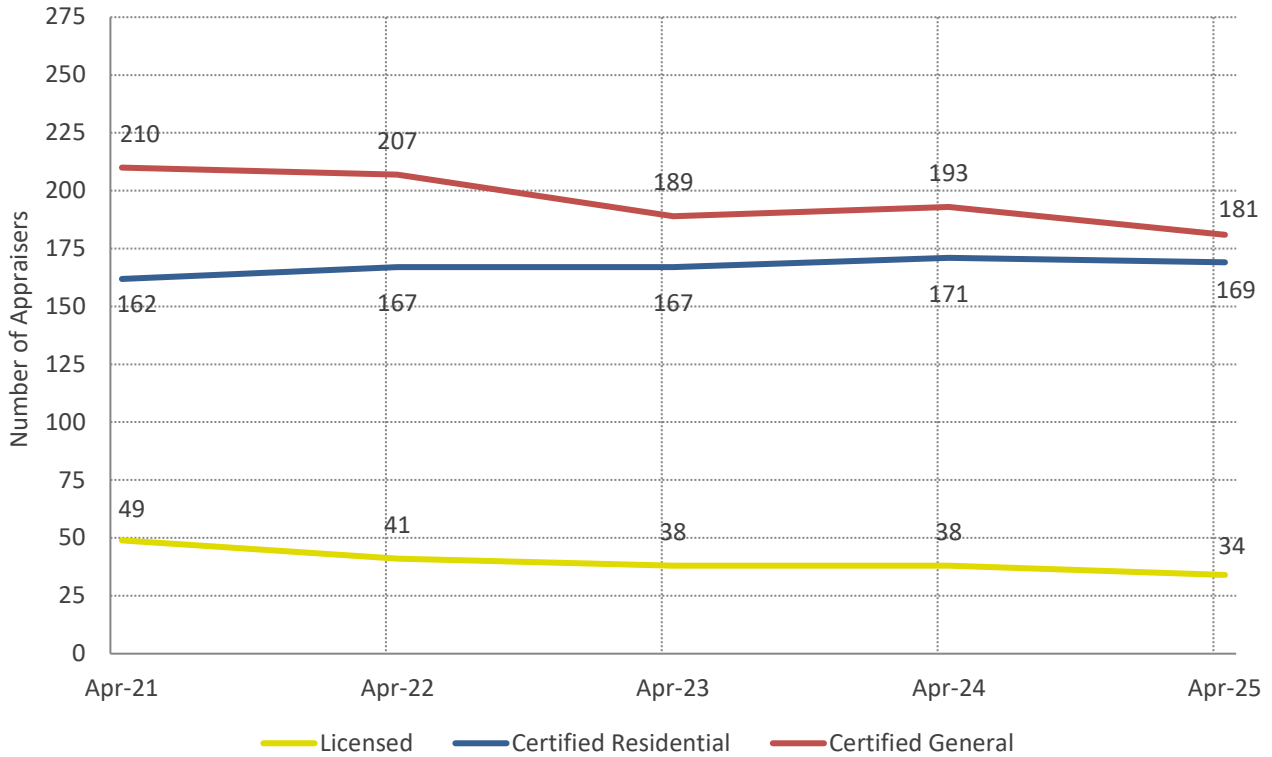
Respectfully submitted,

Tyler N. Kohtz  
Director

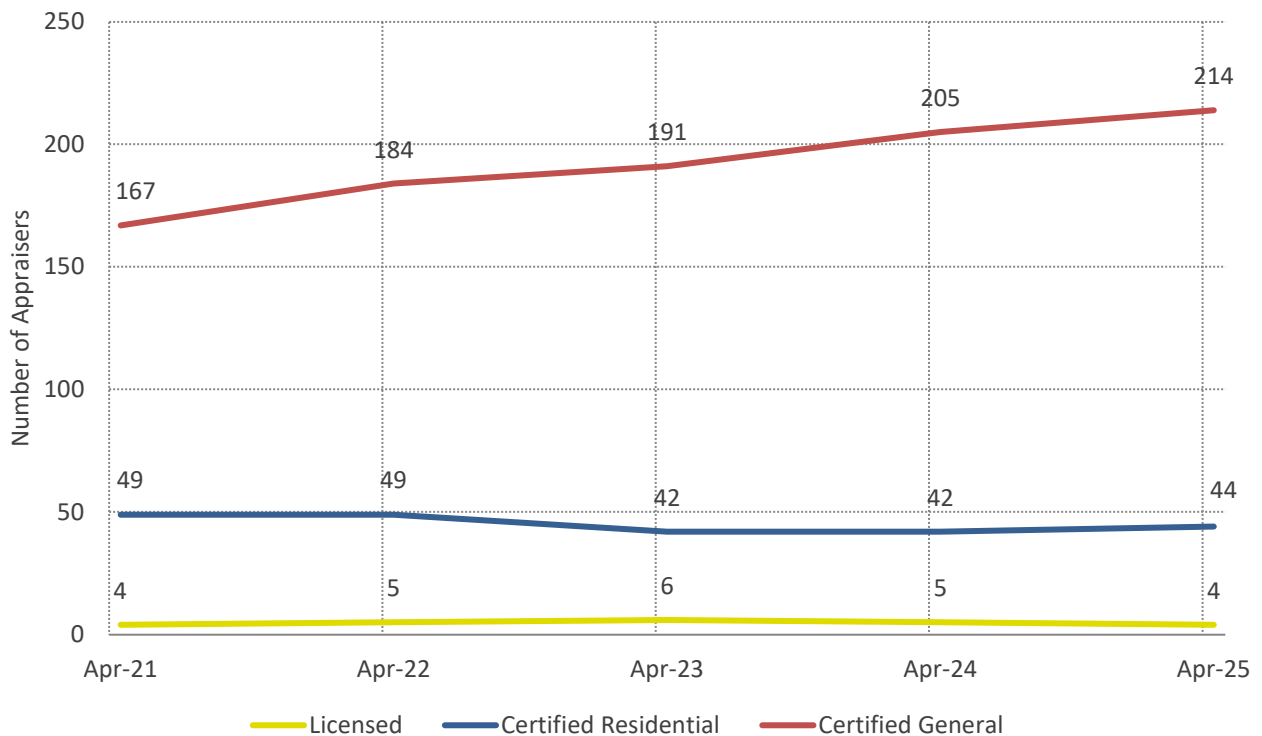
These minutes have been made available for public inspection on March 27, 2025, in compliance with Nebraska Revised Statute §84-1413 (5).

# Real Property Appraiser Report

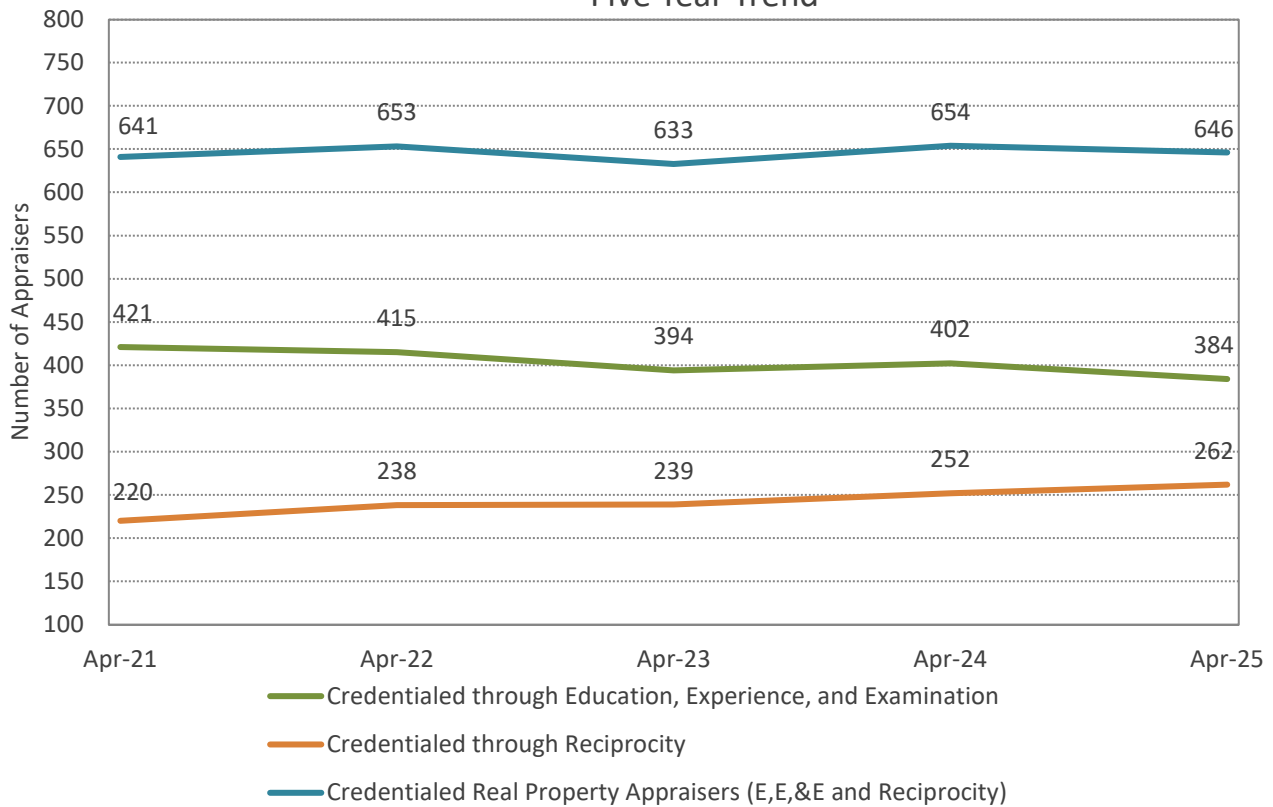
Real Property Appraisers Credentialed through Education, Experience, and Examination (not including Trainee) - Five Year Trend



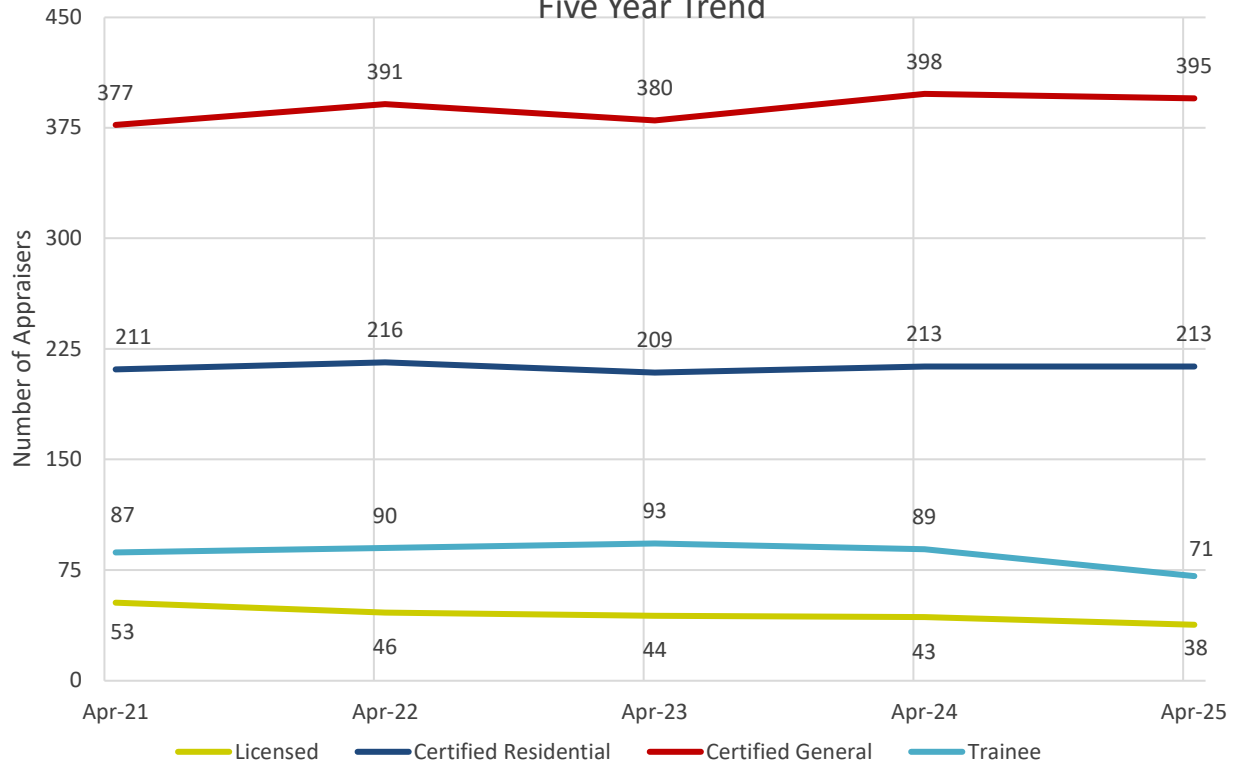
Real Property Appraisers by Classification Credentialed through Reciprocity - Five Year Trend



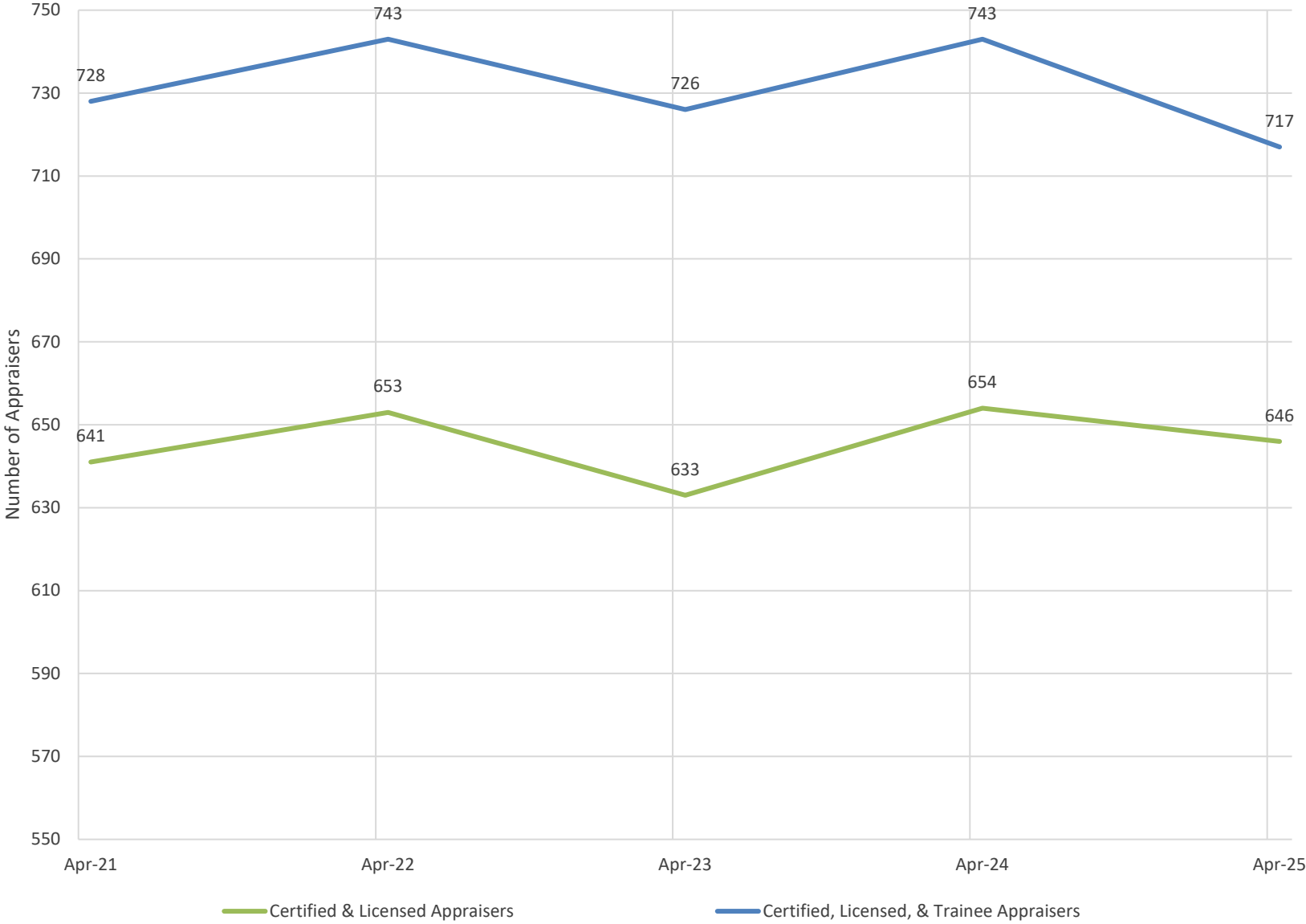
**Total Real Property Appraisers (not including Trainee)  
- Five Year Trend**



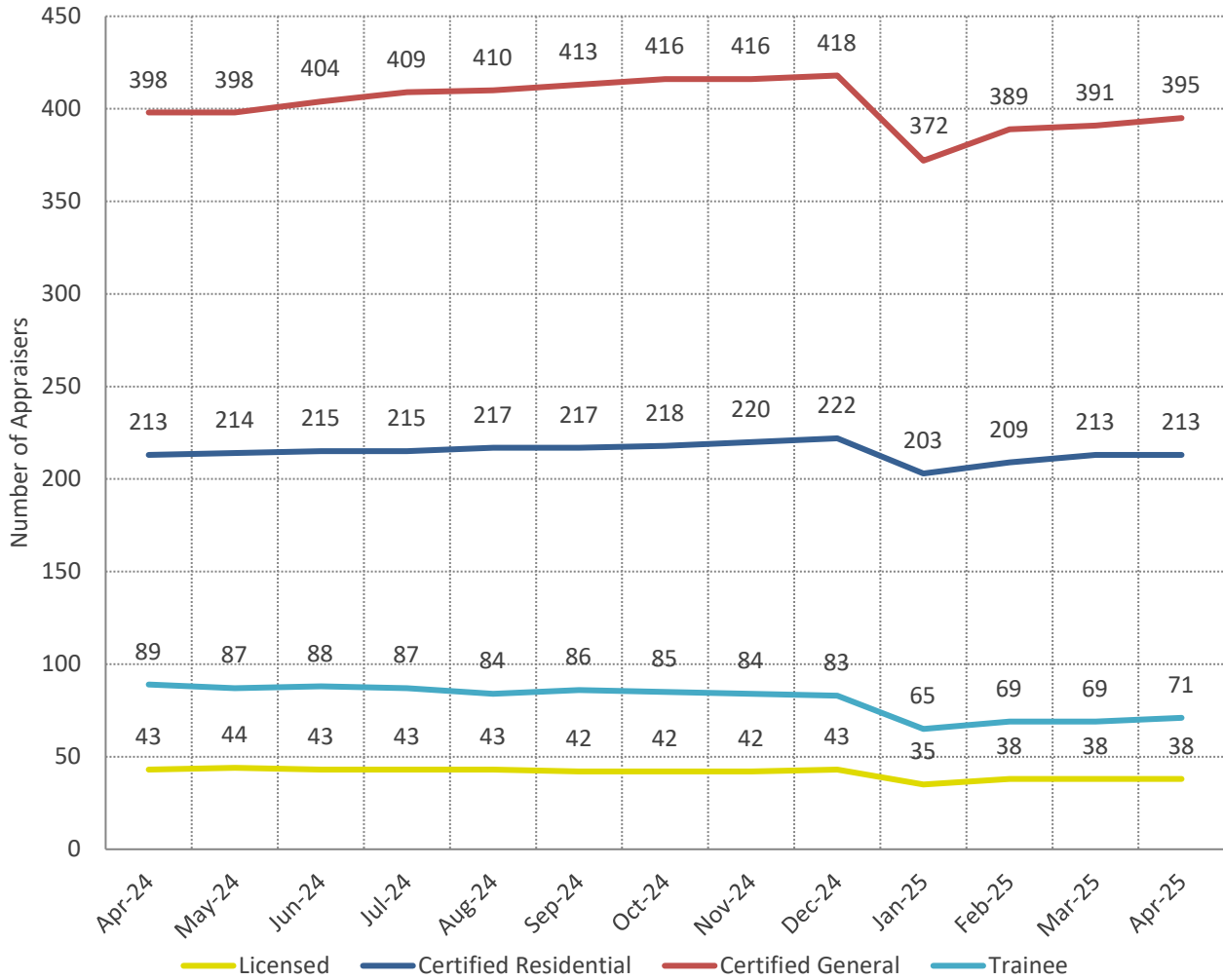
**Total Real Property Appraisers by Classification -  
Five Year Trend**



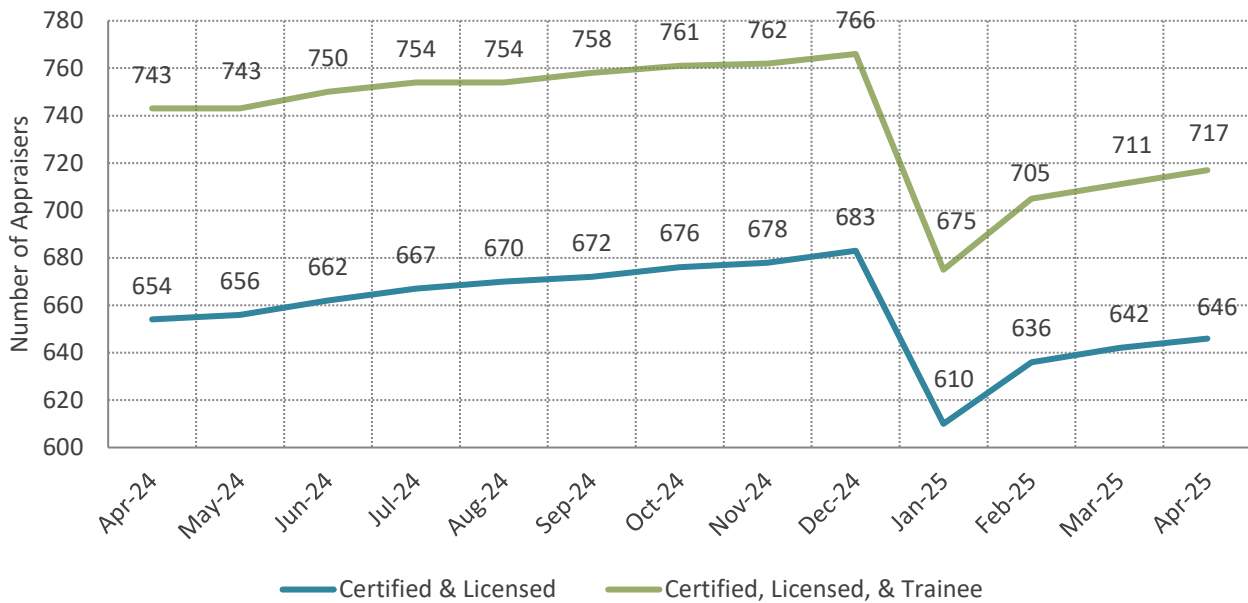
Total Real Property Appraisers - Five Year Trend



### Real Property Appraisers by Classification - Thirteen Month Trend

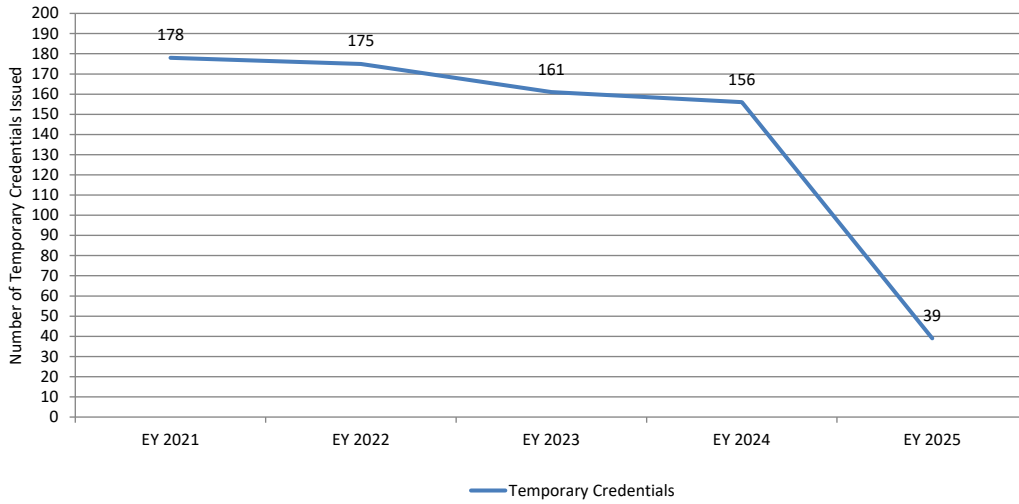


### Total Real Property Appraisers - Thirteen Month Trend

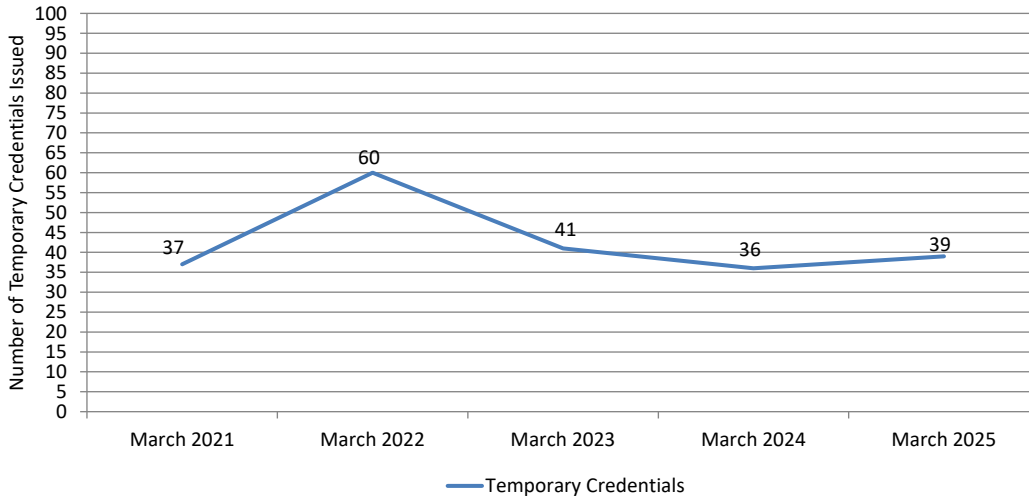


# Temporary Real Property Appraiser Report

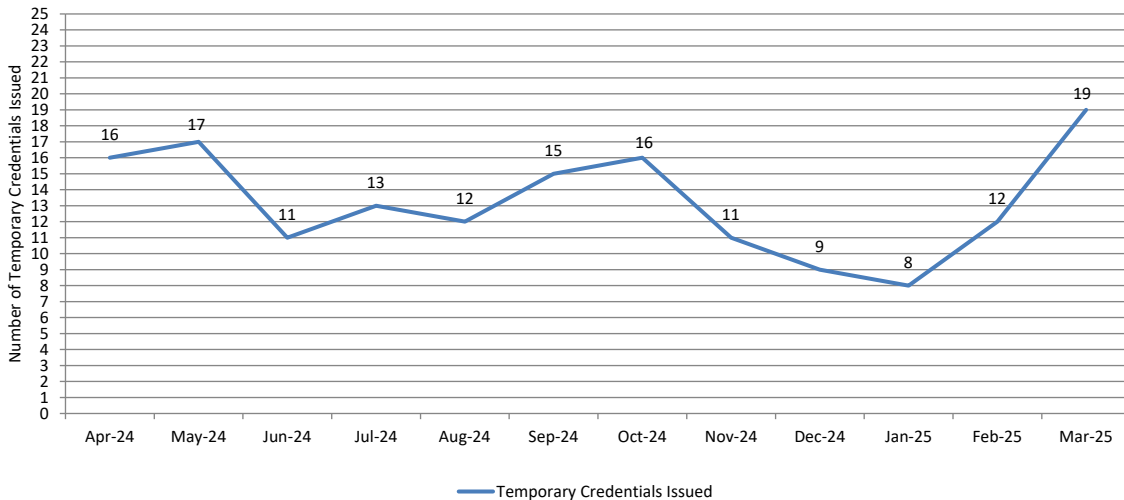
Temporary Real Property Appraiser Credentials Issued by Calendar Year - Five Year Trend



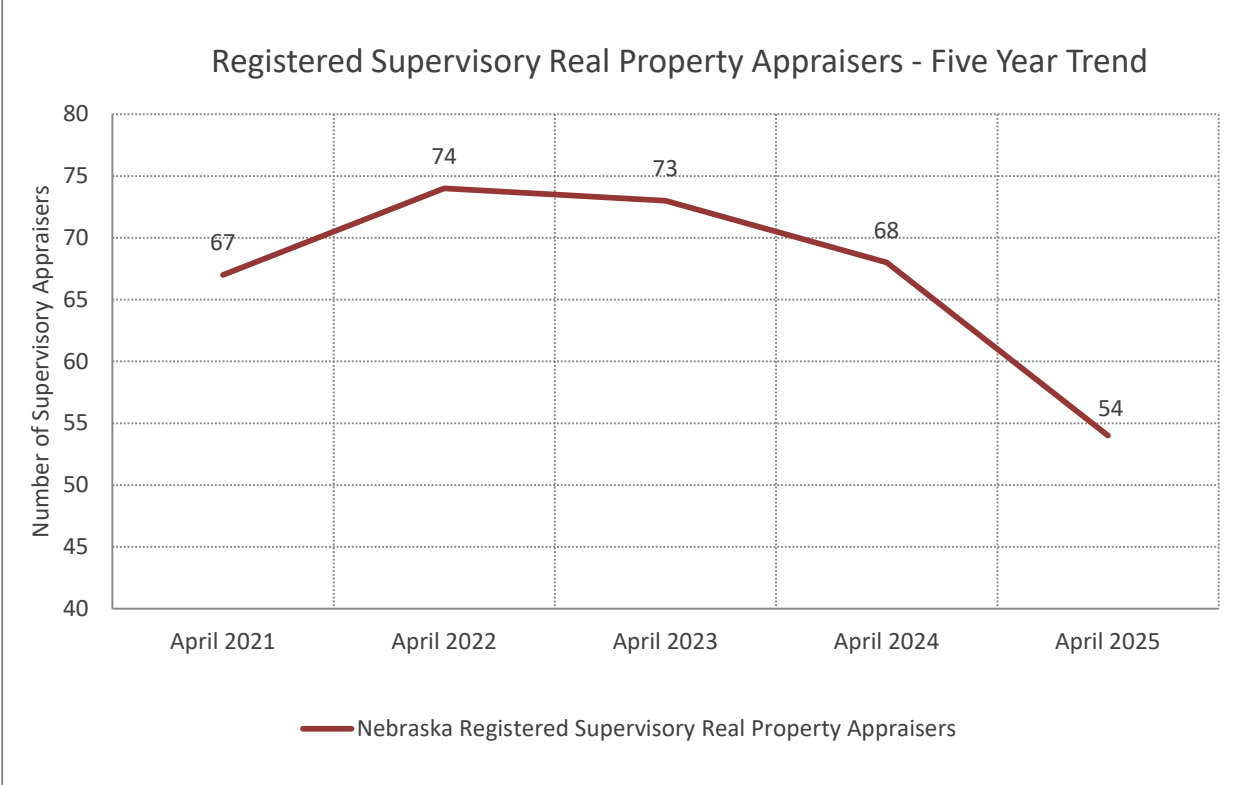
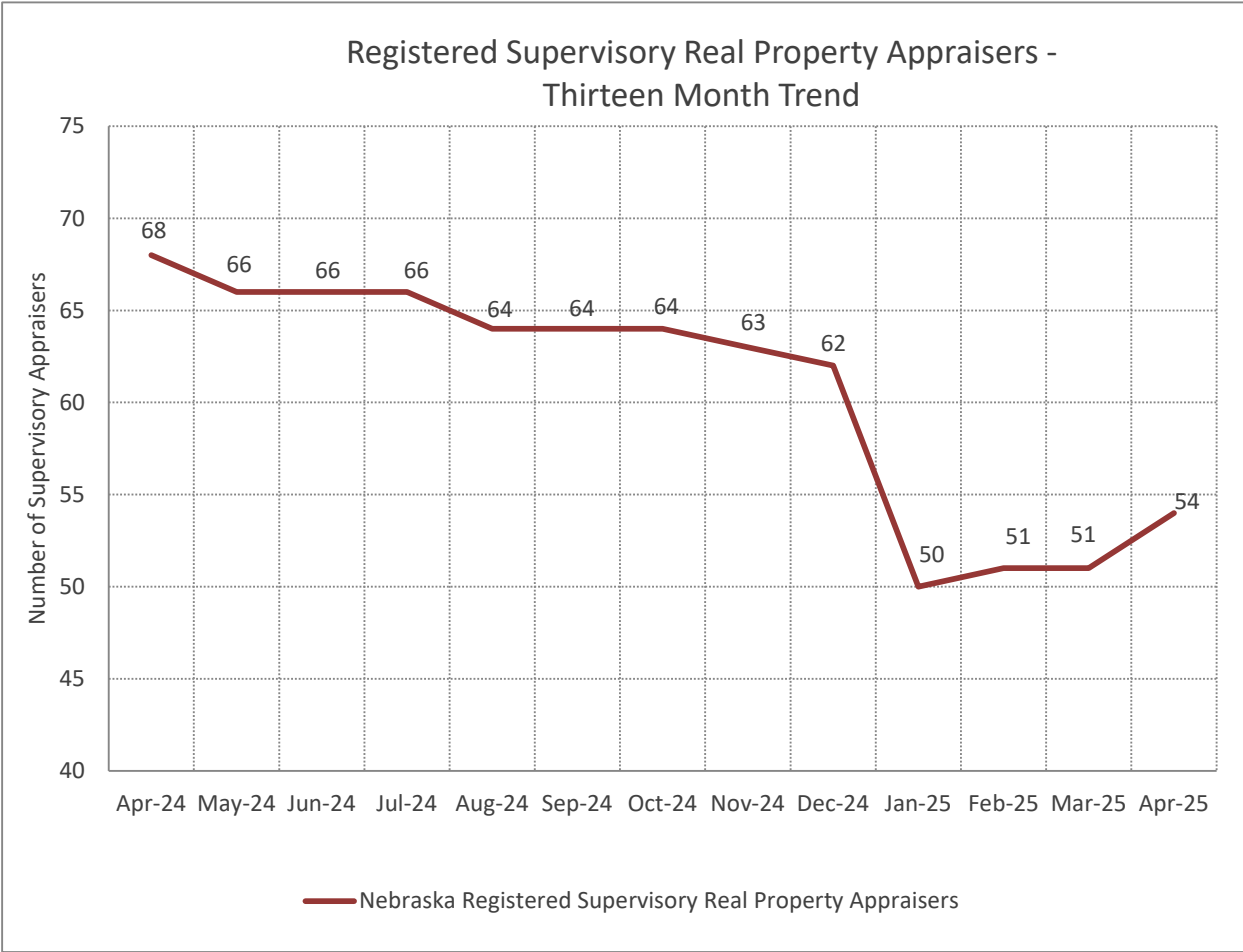
Year-to-date Temporary Real Property Appraiser Credentials Issued - Five Year Trend



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

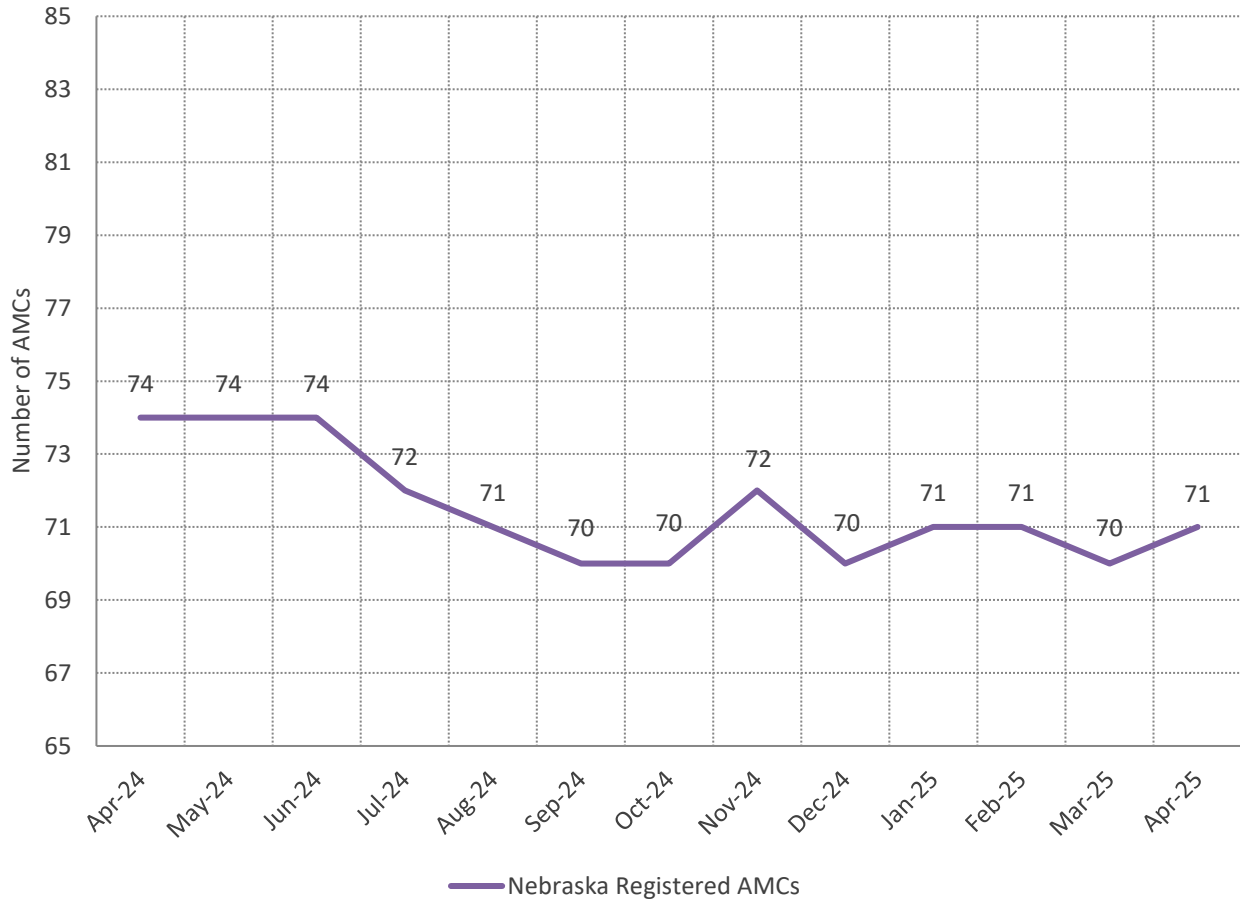


# Supervisory Real Property Appraiser Report

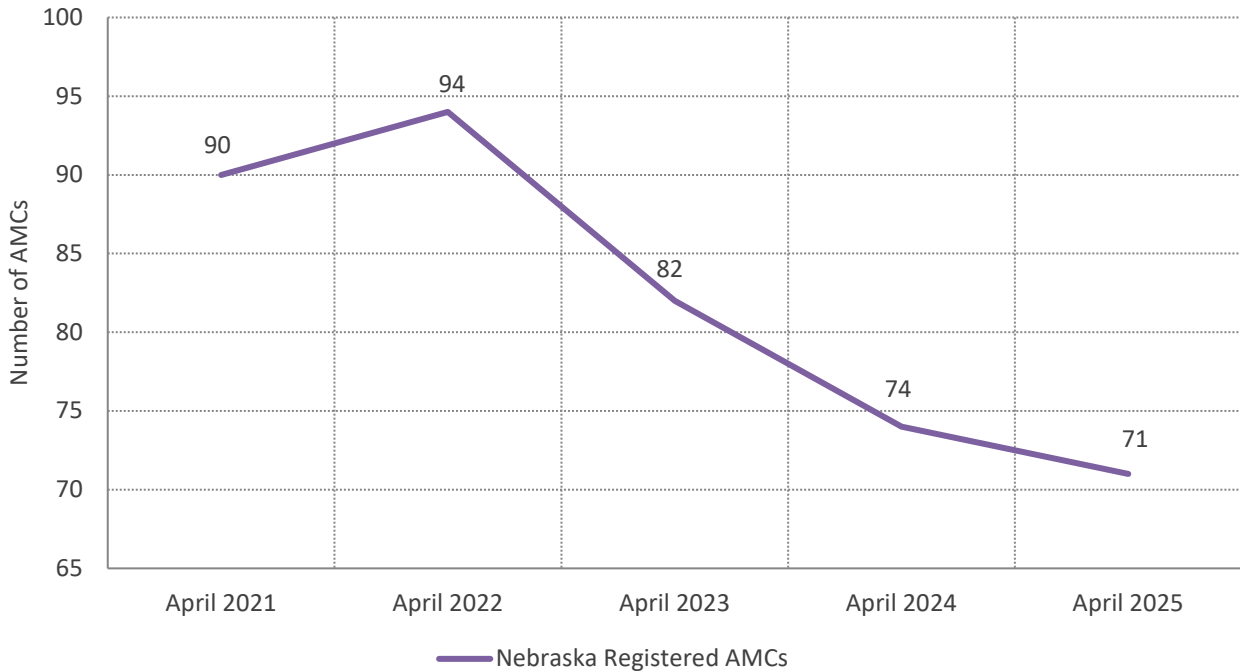


# Appraisal Management Company Report

## Appraisal Management Companies - Thirteen Month Trend



## Appraisal Management Companies - Five Year Trend





# NEBRASKA REAL PROPERTY APPRAISER BOARD

## DIRECTOR APPROVAL OF REAL PROPERTY APPRAISER APPLICANTS

March 12, 2025 – April 8, 2025

<i>New Trainee Real Property Appraisers</i>		
T25004	Weber, Joshua	Approved March 24, 2025, with advisory, no supervisor
<i>New Certified General Real Property Appraisers through Reciprocity</i>		
CG25007R	Clough, Rodney	Approved March 28, 2025

# NEBRASKA REAL PROPERTY APPRAISER BOARD

## DIRECTOR APPROVAL OF EDUCATION ACTIVITY AND INSTRUCTOR(S) APPLICANTS

March 12, 2025 – April 8, 2025

Provider	Activity Number	Hours	Title	Instructor(s)	Approval Date
<i>New Continuing Education Activities and Instructors</i>					
Green Mountain eLearning	2252406.57	4.00	Measuring Square Footage with ANSI	David Thomas	3/14/2025
McKissock, LLC	2253409.03	7.00	Live Webinar: The Appraiser's Guide to the New URAR	Alan Hummel, Alexander Gilbert, Charles Fisher, Charles Huntoon, Dan Bradley, Diana Jacobs, Greg Stephens, Jo Traut, Julie Molendorp-Floyd, Kevin Hecht, Mel Black, Pam Teel, Philicia Lloyd, Robert Abelson, Robert Frazier, Robert McClelland, Sam Martin, Steve Maher	4/3/2025
McKissock, LLC	2251408.03	7.00	The Appraiser's Guide to the New URAR	Alan Hummel, Alexander Gilbert, Charles Fisher, Charles Fisher, Charles Huntoon, Daniel Bone, Dan Bradley, Dan Tosh, Greg Stephens, Howard Kanter, Josh Walitt, Julie Molendorp-Floyd, Kevin Hecht, Mel Black, Pam Teel, Robert Frazier, Robert Luciani, Steve Maher, Tony Pistilli, Wallace Czekalski	4/8/2025
Appraiser eLearning	2253411.33	2.00	Staying Out of the Courtroom Unless You're Being Paid to be There	Peter Christensen	4/8/2025
Appraiser eLearning	2253412.33	4.00	Understanding the Role of Collateral Underwriter	Martin Wagar	4/8/2025

**2024-25 Nebraska Real Property Appraiser Board Goals and Objectives**  
**June 13, 2024 Strategic Planning Meeting**

	SHORT TERM GOALS / OBJECTIVES	EXPECTED COMPLETION DATE	STATUS/GOAL MET	LONG TERM GOALS / OBJECTIVES	EXPECTED COMPLETION DATE	NOTES
<b>LAWS, RULES, AND GUIDANCE DOCUMENTS</b>	Work with the Banking, Commerce and Insurance Legislative Committee's Legal Counsel to draft a bill for introduction to add language to the Real Property Appraiser Act, and the Appraisal Management Company Registration Act, allowing the use of a conditional dismissal in lieu of disciplinary action.	12/31/2024	Completed January 8, 2025.	Address changes to USPAP, Real Property Appraiser Qualifications Criteria, ASC Policy Statements, AQB CAP Program Guidelines, and Title XI as required.	Ongoing.	
	Adopt Title 298 changes to harmonize Title 298 with the changes made to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act in 2024, address the Board's PAVE Dashboard regulations review, add fee schedule, and incorporate changes made to the Real Property Appraiser Qualification Criteria Effective January 1, 2026 and CAP Guidelines effective September 17, 2023.	6/30/2025	Title 298 changes adopted by the Board on February 20, 2025. Approved by AG and now under GPRO review.	Harmonize Title 298 with the changes made to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act as needed.	Ongoing.	
				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.		
<b>COMPLIANCE</b>	Obtain second special assistant attorney general for compliance matters.	1/1/2025	Completed December 19, 2024.	None.		
<b>CREDENTIALING AND REGISTRATION</b>	None.			Explore opportunities to increase the number of Nebraska resident real property appraisers.	Ongoing.	
				Monitor real property appraiser credential renewal dates.	Ongoing.	
<b>EDUCATION</b>	None.			Encourage trainee real property appraisers who intend to engage in real property appraisal practice pertaining to agricultural real property upon credentialing as a certified general real property appraiser complete agricultural-based qualifying education offered by an education provider with an expertise in agricultural appraisal in approval letter sent to trainee real property appraisers.	Ongoing.	
				Request that supervisory real property appraisers with trainee real property appraisers who intend to engage in real property appraisal practice pertaining to agricultural real property upon credentialing as a certified general real property appraiser encourage their trainee real property appraisers to complete agricultural-based qualifying education offered by an education provider with an expertise in agricultural appraisal in approval letter sent to supervisory real property appraisers.	Ongoing.	
<b>PERSONNEL</b>	None.			Continue updating the policies and procedures documents as needed to ensure compliance with state policy changes, NAPE/ASFCE contract changes and to address general work environment needs and/or changes.	Ongoing.	
<b>PUBLIC INFORMATION</b>	None.			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, documents posted to the NRPAB website, meeting information, 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 utilization of the NRPAB Facebook page to disseminate important information in a timely manner that that appraisal business community and general public would otherwise not be aware of, such as documents posted to the NRPAB website, meeting information, and NRPAB policy and business information.	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.	
				Populate the Disciplinary History Search with all real property appraiser and AMC disciplinary action history for active credential and registration holders.	None.	
<b>ADMINISTRATION</b>	Explore credit card payment option for online applications.	6/30/2025	Completed April 17, 2025 - Funding not included in ASC SARAS Grant.	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 for development of online temporary real property appraiser credential application and NRPAB Database interface.	6/30/2025	Completed February 25, 2025	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 real property appraiser initial applications (Reciprocity and E,E,&E), AMC initial applications, education activity applications, and other services that require payment of a fee.	None.	
<b>FINANCIALS</b>	Complete 2025-27 Biennial Budget Request addressing agency issues discussed at strategic planning.	10/1/2024	Completed August 16, 2024.	None.		

**2024-25 NRPAB SWOT Analysis**

STRENGTHS:	WEAKNESSES:	OPPORTUNITIES:	THREATS:
<ul style="list-style-type: none"> <li>* Customer service</li> <li>* Organization</li> <li>* Board member knowledge</li> <li>* Staff knowledge</li> <li>* Adaptability</li> <li>* Professional diversity of Board</li> <li>* Modernization of accessibility</li> </ul>	<ul style="list-style-type: none"> <li>* Industry's inability to grow</li> <li>* Efficiency loss due to database not meeting potential</li> <li>* Regulatory and statutory barriers</li> <li>* Difficulty obtaining new board members</li> </ul>	<ul style="list-style-type: none"> <li>* Growth in real property appraiser field</li> <li>* Continued evaluation of Board and Agency operations</li> <li>* Embrace of available technology</li> <li>* Agency staff size and cross-training of Agency duties</li> <li>* Board member with residential appraisal expertise</li> <li>* Authority for non-disciplinary conditional dismissals</li> <li>* Utilization of ASC grant funding for technology projects</li> <li>* Education of users of appraisal reports</li> </ul>	<ul style="list-style-type: none"> <li>* Agency turnover</li> <li>* Federal agency oversight</li> <li>* Economic climate</li> <li>* Aging appraiser population</li> <li>* Inadequate supervisory appraiser knowledge</li> <li>* Deemphasis on appraisals at the Federal level</li> <li>* Commodification of appraisal reports</li> <li>* Business consolidation</li> <li>* Government consolidation</li> </ul>

Agency 053 REAL PROPERTY APPRAISER BD  
Division  
Program 079 APPRAISER LICENSING

Percent of Time Elapsed = 75.07

ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
<b><u>BUDGETED FUND TYPES - EXPENDITURES</u></b>						
<b>510000 PERSONAL SERVICES</b>						
511100 PERMANENT SALARIES-WAGES	209,719.34	15,845.28	140,217.92	66.86		69,501.42
511300 OVERTIME PAYMENTS			3,825.30			3,825.30-
511600 PER DIEM PAYMENTS	8,100.00	400.00	4,100.00	50.62		4,000.00
511700 EMPLOYEE BONUSES	2,000.00		1,500.00	75.00		500.00
511800 COMPENSATORY TIME PAID			72.68			72.68-
512100 VACATION LEAVE EXPENSE	17,796.97	751.93	12,120.38	68.10		5,676.59
512200 SICK LEAVE EXPENSE	2,591.66	58.14	7,106.15	274.19		4,514.49-
512300 HOLIDAY LEAVE EXPENSE	11,608.66	876.60	10,416.98	89.73		1,191.68
<b>Personal Services Subtotal</b>	<b>251,816.63</b>	<b>17,931.95</b>	<b>179,359.41</b>	<b>71.23</b>	<b>0.00</b>	<b>72,457.22</b>
515100 RETIREMENT PLANS EXPENSE	18,277.76	1,312.78	13,011.13	71.19		5,266.63
515200 FICA EXPENSE	19,188.36	1,224.20	12,438.15	64.82		6,750.21
515500 HEALTH INSURANCE EXPENSE	59,730.00	4,977.52	42,530.80	71.21		17,199.20
516500 WORKERS COMP PREMIUMS	1,546.00		1,546.00	100.00		
<b>Major Account 510000 Total</b>	<b>350,558.75</b>	<b>25,446.45</b>	<b>248,885.49</b>	<b>71.00</b>	<b>0.00</b>	<b>101,673.26</b>
<b>520000 OPERATING EXPENSES</b>						
521100 POSTAGE EXPENSE	2,588.65	258.15	2,096.66	80.99		491.99
521400 CIO CHARGES	33,122.81	1,883.73	19,731.29	59.57		13,391.52
521500 PUBLICATION & PRINT EXP	3,451.20	18.50	1,802.35	52.22		1,648.85
521900 AWARDS EXPENSE	50.00		36.12	72.24		13.88
522100 DUES & SUBSCRIPTION EXP	600.00		600.00	100.00		
522200 CONFERENCE REGISTRATION		650.00-				
524600 RENT EXPENSE-BUILDINGS	12,801.70	1,062.36	9,572.79	74.78		3,228.91
524900 RENT EXP-DEPR SURCHARGE	4,187.00	348.91	3,140.19	75.00		1,046.81
527100 REP & MAINT-OFFICE EQUIP	136.00		136.00	100.00		
531100 OFFICE SUPPLIES EXPENSE	2,077.59		335.22	16.14		1,742.37
532100 NON-CAPITALIZED EQUIP PU	1,830.00		1,830.00	100.00		
541100 ACCTG & AUDITING SERVICES	1,128.00		1,128.00	100.00		
541200 PURCHASING ASSESSMENT	39.00		39.00	100.00		
541500 LEGAL SERVICES EXPENSE	20,000.00	627.50	1,887.50	9.44		18,112.50
541700 LEGAL RELATED EXPENSE	3,000.00		30.00	1.00		2,970.00
542100 SOS TEMP SERV - PERSONNEL	6,200.00		4,867.85	78.51		1,332.15

STATE OF NEBRASKA  
Department of Administrative Services  
Accounting Division  
Budget Status Report  
As of 03/31/25

Agency 053 REAL PROPERTY APPRAISER BD  
Division  
Program 079 APPRAISER LICENSING

Percent of Time Elapsed = 75.07

ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
547100 EDUCATIONAL SERVICES	68.00		51.00	75.00		17.00
554900 OTHER CONTRACTUAL SERVICES	27,090.50	1,834.00	11,507.54	42.48	750.00	14,832.96
556100 INSURANCE EXPENSE	53.00		18.18	34.30		34.82
559100 OTHER OPERATING EXP	32,128.56		127.00	.40		32,001.56
<b>Major Account 520000 Total</b>	<b>150,552.01</b>	<b>5,383.15</b>	<b>58,936.69</b>	<b>39.15</b>	<b>750.00</b>	<b>90,865.32</b>
<b>570000 TRAVEL EXPENSES</b>						
571100 LODGING	3,621.00	1,159.88-	1,727.00	47.69		1,894.00
571800 MEALS - TRAVEL STATUS	2,045.88	211.23-	1,038.56	50.76		1,007.32
573100 STATE-OWNED TRANSPORT	200.00					200.00
574500 PERSONAL VEHICLE MILEAGE	9,209.82	885.07-	4,643.10	50.41		4,566.72
575100 MISC TRAVEL EXPENSE	437.50		189.50	43.31		248.00
<b>Major Account 570000 Total</b>	<b>15,514.20</b>	<b>2,256.18-</b>	<b>7,598.16</b>	<b>48.98</b>	<b>0.00</b>	<b>7,916.04</b>
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>516,624.96</b>	<b>28,573.42</b>	<b>315,420.34</b>	<b>61.05</b>	<b>750.00</b>	<b>200,454.62</b>

**SUMMARY BY FUND TYPE - EXPENDITURES**

2 CASH FUNDS	516,624.96	28,573.42	315,420.34	61.05	750.00	200,454.62
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>516,624.96</b>	<b>28,573.42</b>	<b>315,420.34</b>	<b>61.05</b>	<b>750.00</b>	<b>200,454.62</b>

**BUDGETED FUND TYPES - REVENUES**

**470000 REVENUE - SALES AND CHARGES**

471100 SALE OF SERVICES	450.00-	25.00-	350.00-	77.78		100.00-
471120 QUALIFYING ED COURSE FEES	1,600.00-		550.00-	34.38		1,050.00-
471121 CONTINUING ED NEW FEES	2,500.00-	150.00-	1,100.00-	44.00		1,400.00-
471122 CONTINUING ED RENEWAL FEES	150.00-	10.00-	60.00-	40.00		90.00-
475150 CERTIFIED GENERAL NEW FEES	9,300.00-	1,200.00-	6,000.00-	64.52		3,300.00-
475151 LICENSED NEW FEES	300.00-		300.00-	100.00		
475152 FINGERPRINT FEES	2,760.25-	135.75-	1,945.75-	70.49		814.50-
475153 CERTIFIED RESIDENTIAL NEW	3,000.00-	1,200.00-	3,000.00-	100.00		
475154 CERTIFIED GENERAL RENEWAL	116,050.00-		122,925.00-	105.92		6,875.00
475155 LICENSED RENEWAL	12,100.00-		12,100.00-	100.00		
475156 FINGERPRINT AUDIT PROGRAM FEES			20.00-			20.00
475157 CERTIFIED RESIDENTIAL RENEWAL	62,700.00-		60,775.00-	96.93		1,925.00-

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Percent of Time Elapsed = 75.07

	BUDGETED	CURRENT MONTH	YEAR-TO-DATE	PERCENT OF		
ACCOUNT CODE DESCRIPTION	AMOUNT	ACTIVITY	ACTUALS	BUDGET	ENCUMBERANCES	VARIANCE
475161 TEMPORARY CERTIFIED GENERAL	8,250.00-	800.00-	5,650.00-	68.48		2,600.00-
475163 AMC REGISTERED NEW FEES	4,000.00-		8,000.00-	200.00		4,000.00
475164 AMC APPLICATION FEES	700.00-		1,750.00-	250.00		1,050.00
475165 AMC REGISTERED RENEWAL	99,000.00-	6,000.00-	75,000.00-	75.76		24,000.00-
475166 FED REG AMC RPT FORM PROC FEES	700.00-	350.00-	700.00-	100.00		
475167 CERTIFIED RESIDENTIAL INACTIVE	300.00-					300.00-
475168 CERTIFIED GENERAL INACTIVE	300.00-					300.00-
475234 APPLICATION FEES	25,650.00-	2,050.00-	17,750.00-	69.20		7,900.00-
476101 LATE PROCESSING FEES	4,175.00-		3,050.00-	73.05		1,125.00-
<b>Major Account 470000 Total</b>	<b>353,985.25-</b>	<b>11,920.75-</b>	<b>321,025.75-</b>	<b>90.69</b>	<b>0.00</b>	<b>32,959.50-</b>
<b>480000 REVENUE - MISCELLANEOUS</b>						
481100 INVESTMENT INCOME	21,000.00-	1,825.86-	18,157.45-	86.46		2,842.55-
484500 REIMB NON-GOVT SOURCES	1,000.00-	700.00-	2,557.62-	255.76		1,557.62
485101 AMC FORFEITS & PENALTY		1,500.00-	1,500.00-			1,500.00
<b>Major Account 480000 Total</b>	<b>22,000.00-</b>	<b>4,025.86-</b>	<b>22,215.07-</b>	<b>100.98</b>	<b>0.00</b>	<b>215.07</b>
<b>490000 REVENUE - OTHER FINANCIAL SOURCES/U</b>						
491300 SALE - SURP PROP/FIXED ASSET			92.00-			92.00
<b>Major Account 490000 Total</b>	<b>0.00</b>	<b>0.00</b>	<b>92.00-</b>	<b>0.00</b>	<b>0.00</b>	<b>92.00</b>
<b>BUDGETED REVENUE TOTAL</b>	<b>375,985.25-</b>	<b>15,946.61-</b>	<b>343,332.82-</b>	<b>91.32</b>	<b>0.00</b>	<b>32,652.43-</b>
<b>SUMMARY BY FUND TYPE - REVENUE</b>						
2 CASH FUNDS	375,985.25-	15,946.61-	343,332.82-	91.32		32,652.43-
<b>BUDGETED REVENUE TOTAL</b>	<b>375,985.25-</b>	<b>15,946.61-</b>	<b>343,332.82-</b>	<b>91.32</b>	<b>0.00</b>	<b>32,652.43-</b>

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ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
<b><u>BUDGETED FUND TYPES - EXPENDITURES</u></b>						
<b>510000 PERSONAL SERVICES</b>						
511100 PERMANENT SALARIES-WAGES	136,317.62	10,299.27	91,141.84	66.86		45,175.78
511300 OVERTIME PAYMENTS			2,486.14			2,486.14-
511600 PER DIEM PAYMENTS	5,265.00	260.00	2,665.00	50.62		2,600.00
511700 EMPLOYEE BONUSES	1,300.00		975.00	75.00		325.00
511800 COMPENSATORY TIME PAID			47.29			47.29-
512100 VACATION LEAVE EXPENSE	11,568.03	488.89	7,877.57	68.10		3,690.46
512200 SICK LEAVE EXPENSE	1,684.53	37.79	4,618.84	274.19		2,934.31-
512300 HOLIDAY LEAVE EXPENSE	7,545.63	569.79	6,771.04	89.73		774.59
<b>Personal Services Subtotal</b>	<b>163,680.81</b>	<b>11,655.74</b>	<b>116,582.72</b>	<b>71.23</b>	<b>0.00</b>	<b>47,098.09</b>
515100 RETIREMENT PLANS EXPENSE	11,880.56	853.32	8,457.20	71.19		3,423.36
515200 FICA EXPENSE	12,472.45	795.74	8,084.69	64.82		4,387.76
515500 HEALTH INSURANCE EXPENSE	38,824.50	3,235.35	27,644.72	71.20		11,179.78
516500 WORKERS COMP PREMIUMS	1,004.90		1,004.90	100.00		
<b>Major Account 510000 Total</b>	<b>227,863.22</b>	<b>16,540.15</b>	<b>161,774.23</b>	<b>71.00</b>	<b>0.00</b>	<b>66,088.99</b>
<b>520000 OPERATING EXPENSES</b>						
521100 POSTAGE EXPENSE	1,621.57	185.30	1,726.11	106.45		104.54-
521400 CIO CHARGES	21,529.83	1,224.43	12,753.45	59.24		8,776.38
521500 PUBLICATION & PRINT EXP	2,243.28	192.05-	1,174.77	52.37		1,068.51
521900 AWARDS EXPENSE	32.50		23.48	72.25		9.02
522100 DUES & SUBSCRIPTION EXP	390.00		390.00	100.00		
522200 CONFERENCE REGISTRATION		422.50-				
524600 RENT EXPENSE-BUILDINGS	8,321.11	690.53	6,584.34	79.13	362.01-	2,098.78
524900 RENT EXP-DEPR SURCHARGE	2,721.55	226.79	2,163.23	79.49	122.12-	680.44
527100 REP & MAINT-OFFICE EQUIP	88.40		88.40	100.00		
531100 OFFICE SUPPLIES EXPENSE	1,350.43	35.57-	217.89	16.13		1,132.54
532100 NON-CAPITALIZED EQUIP PU	1,189.50		1,189.50	100.00		
541100 ACCTG & AUDITING SERVICES	733.20		733.20	100.00		
541200 PURCHASING ASSESSMENT	25.35		25.35	100.00		
541500 LEGAL SERVICES EXPENSE	18,000.00		1,260.00	7.00		16,740.00
541700 LEGAL RELATED EXPENSE	2,700.00		30.00	1.11		2,670.00
542100 SOS TEMP SERV - PERSONNEL	4,030.00		3,164.10	78.51		865.90



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ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
547100 EDUCATIONAL SERVICES	44.20		33.15	75.00		11.05
554900 OTHER CONTRACTUAL SERVICES	26,395.25	1,788.75	11,144.89	42.22	750.00	14,500.36
556100 INSURANCE EXPENSE	34.45		11.82	34.31		22.63
559100 OTHER OPERATING EXP	20,883.56		84.55	.40		20,799.01
<b>Major Account 520000 Total</b>	<b>112,334.18</b>	<b>3,465.68</b>	<b>42,798.23</b>	<b>38.10</b>	<b>265.87</b>	<b>69,270.08</b>
<b>570000 TRAVEL EXPENSES</b>						
571100 LODGING	2,353.65	753.92-	1,122.55	47.69		1,231.10
571800 MEALS - TRAVEL STATUS	1,329.81	137.30-	675.02	50.76		654.79
573100 STATE-OWNED TRANSPORT	130.00					130.00
574500 PERSONAL VEHICLE MILEAGE	5,986.39	575.30-	3,018.04	50.42		2,968.35
575100 MISC TRAVEL EXPENSE	284.37		123.17	43.31		161.20
<b>Major Account 570000 Total</b>	<b>10,084.22</b>	<b>1,466.52-</b>	<b>4,938.78</b>	<b>48.98</b>	<b>0.00</b>	<b>5,145.44</b>
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>350,281.62</b>	<b>18,539.31</b>	<b>209,511.24</b>	<b>59.81</b>	<b>265.87</b>	<b>140,504.51</b>

**SUMMARY BY FUND TYPE - EXPENDITURES**

2 CASH FUNDS	350,281.62	18,539.31	209,511.24	59.81	265.87	140,504.51
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>350,281.62</b>	<b>18,539.31</b>	<b>209,511.24</b>	<b>59.81</b>	<b>265.87</b>	<b>140,504.51</b>

**BUDGETED FUND TYPES - REVENUES**

**470000 REVENUE - SALES AND CHARGES**

471100 SALE OF SERVICES	450.00-	25.00-	350.00-	77.78		100.00-
471120 QUALIFYING ED COURSE FEES	1,600.00-		550.00-	34.38		1,050.00-
471121 CONTINUING ED NEW FEES	2,500.00-	150.00-	1,100.00-	44.00		1,400.00-
471122 CONTINUING ED RENEWAL FEES	150.00-	10.00-	60.00-	40.00		90.00-
475150 CERTIFIED GENERAL NEW FEES	9,300.00-	1,200.00-	6,000.00-	64.52		3,300.00-
475151 LICENSED NEW FEES	300.00-		300.00-	100.00		
475152 FINGERPRINT FEES	2,760.25-	135.75-	1,945.75-	70.49		814.50-
475153 CERTIFIED RESIDENTIAL NEW	3,000.00-	1,200.00-	3,000.00-	100.00		
475154 CERTIFIED GENERAL RENEWAL	116,050.00-		122,925.00-	105.92		6,875.00
475155 LICENSED RENEWAL	12,100.00-		12,100.00-	100.00		
475156 FINGERPRINT AUDIT PROGRAM FEES			20.00-			20.00
475157 CERTIFIED RESIDENTIAL RENEWAL	62,700.00-		60,775.00-	96.93		1,925.00-

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ACCOUNT CODE DESCRIPTION		BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
475161	TEMPORARY CERTIFIED GENERAL	8,250.00-	800.00-	5,650.00-	68.48		2,600.00-
475167	CERTIFIED RESIDENTIAL INACTIVE	300.00-					300.00-
475168	CERTIFIED GENERAL INACTIVE	300.00-					300.00-
475234	APPLICATION FEES	25,650.00-	2,050.00-	17,750.00-	69.20		7,900.00-
476101	LATE PROCESSING FEES	3,900.00-		2,875.00-	73.72		1,025.00-
<b>Major Account 470000 Total</b>		<b>249,310.25-</b>	<b>5,570.75-</b>	<b>235,400.75-</b>	<b>94.42</b>	<b>0.00</b>	<b>13,909.50-</b>
<b>480000 REVENUE - MISCELLANEOUS</b>							
481100	INVESTMENT INCOME	12,000.00-	1,075.66-	10,322.65-	86.02		1,677.35-
484500	REIMB NON-GOVT SOURCES	500.00-	200.00-	2,013.20-	402.64		1,513.20
<b>Major Account 480000 Total</b>		<b>12,500.00-</b>	<b>1,275.66-</b>	<b>12,335.85-</b>	<b>98.69</b>	<b>0.00</b>	<b>164.15-</b>
<b>490000 REVENUE - OTHER FINANCIAL SOURCES/U</b>							
491300	SALE - SURP PROP/FIXED ASSET			59.80-			59.80
<b>Major Account 490000 Total</b>		<b>0.00</b>	<b>0.00</b>	<b>59.80-</b>	<b>0.00</b>	<b>0.00</b>	<b>59.80</b>
<b>BUDGETED REVENUE TOTAL</b>		<b>261,810.25-</b>	<b>6,846.41-</b>	<b>247,796.40-</b>	<b>94.65</b>	<b>0.00</b>	<b>14,013.85-</b>
<b>SUMMARY BY FUND TYPE - REVENUE</b>							
2	CASH FUNDS	261,810.25-	6,846.41-	247,796.40-	94.65		14,013.85-
<b>BUDGETED REVENUE TOTAL</b>		<b>261,810.25-</b>	<b>6,846.41-</b>	<b>247,796.40-</b>	<b>94.65</b>	<b>0.00</b>	<b>14,013.85-</b>

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ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
<b>BUDGETED FUND TYPES - EXPENDITURES</b>						
<b>510000 PERSONAL SERVICES</b>						
511100 PERMANENT SALARIES-WAGES	73,401.72	5,546.01	49,076.08	66.86		24,325.64
511300 OVERTIME PAYMENTS			1,339.16			1,339.16-
511600 PER DIEM PAYMENTS	2,835.00	140.00	1,435.00	50.62		1,400.00
511700 EMPLOYEE BONUSES	700.00		525.00	75.00		175.00
511800 COMPENSATORY TIME PAID			25.39			25.39-
512100 VACATION LEAVE EXPENSE	6,228.94	263.04	4,242.81	68.11		1,986.13
512200 SICK LEAVE EXPENSE	907.13	20.35	2,487.31	274.20		1,580.18-
512300 HOLIDAY LEAVE EXPENSE	4,063.03	306.81	3,645.94	89.73		417.09
<b>Personal Services Subtotal</b>	<b>88,135.82</b>	<b>6,276.21</b>	<b>62,776.69</b>	<b>71.23</b>	<b>0.00</b>	<b>25,359.13</b>
515100 RETIREMENT PLANS EXPENSE	6,397.20	459.46	4,553.93	71.19		1,843.27
515200 FICA EXPENSE	6,715.91	428.46	4,353.46	64.82		2,362.45
515500 HEALTH INSURANCE EXPENSE	20,905.50	1,742.17	14,886.08	71.21		6,019.42
516500 WORKERS COMP PREMIUMS	541.10		541.10	100.00		
<b>Major Account 510000 Total</b>	<b>122,695.53</b>	<b>8,906.30</b>	<b>87,111.26</b>	<b>71.00</b>	<b>0.00</b>	<b>35,584.27</b>
<b>520000 OPERATING EXPENSES</b>						
521100 POSTAGE EXPENSE	967.08	72.85	370.55	38.32		596.53
521400 CIO CHARGES	11,592.98	659.30	6,977.84	60.19		4,615.14
521500 PUBLICATION & PRINT EXP	1,207.92	210.55	627.58	51.96		580.34
521900 AWARDS EXPENSE	17.50		12.64	72.23		4.86
522100 DUES & SUBSCRIPTION EXP	210.00		210.00	100.00		
522200 CONFERENCE REGISTRATION		227.50-				
524600 RENT EXPENSE-BUILDINGS	4,480.59	371.83	2,988.45	66.70	362.01	1,130.13
524900 RENT EXP-DEPR SURCHARGE	1,465.45	122.12	976.96	66.67	122.12	366.37
527100 REP & MAINT-OFFICE EQUIP	47.60		47.60	100.00		
531100 OFFICE SUPPLIES EXPENSE	727.16	35.57	117.33	16.14		609.83
532100 NON-CAPITALIZED EQUIP PU	640.50		640.50	100.00		
541100 ACCTG & AUDITING SERVICES	394.80		394.80	100.00		
541200 PURCHASING ASSESSMENT	13.65		13.65	100.00		
541500 LEGAL SERVICES EXPENSE	2,000.00	627.50	627.50	31.38		1,372.50
541700 LEGAL RELATED EXPENSE	300.00					300.00
542100 SOS TEMP SERV - PERSONNEL	2,170.00		1,703.75	78.51		466.25



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ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
547100 EDUCATIONAL SERVICES	23.80		17.85	75.00		5.95
554900 OTHER CONTRACTUAL SERVICES	695.25	45.25	362.65	52.16		332.60
556100 INSURANCE EXPENSE	18.55		6.36	34.29		12.19
559100 OTHER OPERATING EXP	11,245.00		42.45	.38		11,202.55
<b>Major Account 520000 Total</b>	<b>38,217.83</b>	<b>1,917.47</b>	<b>16,138.46</b>	<b>42.23</b>	<b>484.13</b>	<b>21,595.24</b>
<b>570000 TRAVEL EXPENSES</b>						
571100 LODGING	1,267.35	405.96-	604.45	47.69		662.90
571800 MEALS - TRAVEL STATUS	716.07	73.93-	363.54	50.77		352.53
573100 STATE-OWNED TRANSPORT	70.00					70.00
574500 PERSONAL VEHICLE MILEAGE	3,223.43	309.77-	1,625.06	50.41		1,598.37
575100 MISC TRAVEL EXPENSE	153.13		66.33	43.32		86.80
<b>Major Account 570000 Total</b>	<b>5,429.98</b>	<b>789.66-</b>	<b>2,659.38</b>	<b>48.98</b>	<b>0.00</b>	<b>2,770.60</b>
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>166,343.34</b>	<b>10,034.11</b>	<b>105,909.10</b>	<b>63.67</b>	<b>484.13</b>	<b>59,950.11</b>
<b>SUMMARY BY FUND TYPE - EXPENDITURES</b>						
2 CASH FUNDS	166,343.34	10,034.11	105,909.10	63.67	484.13	59,950.11
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>166,343.34</b>	<b>10,034.11</b>	<b>105,909.10</b>	<b>63.67</b>	<b>484.13</b>	<b>59,950.11</b>
<b>BUDGETED FUND TYPES - REVENUES</b>						
<b>470000 REVENUE - SALES AND CHARGES</b>						
475163 AMC REGISTERED NEW FEES	4,000.00-		8,000.00-	200.00		4,000.00
475164 AMC APPLICATION FEES	700.00-		1,750.00-	250.00		1,050.00
475165 AMC REGISTERED RENEWAL	99,000.00-	6,000.00-	75,000.00-	75.76		24,000.00-
475166 FED REG AMC RPT FORM PROC FEES	700.00-	350.00-	700.00-	100.00		
476101 LATE PROCESSING FEES	275.00-		175.00-	63.64		100.00-
<b>Major Account 470000 Total</b>	<b>104,675.00-</b>	<b>6,350.00-</b>	<b>85,625.00-</b>	<b>81.80</b>	<b>0.00</b>	<b>19,050.00-</b>
<b>480000 REVENUE - MISCELLANEOUS</b>						
481100 INVESTMENT INCOME	9,000.00-	750.20-	7,834.80-	87.05		1,165.20-
484500 REIMB NON-GOVT SOURCES	500.00-	500.00-	544.42-	108.88		44.42



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ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
485101 AMC FORFEITS & PENALTY		1,500.00-	1,500.00-			1,500.00
<b>Major Account 480000 Total</b>	<u>9,500.00-</u>	<u>2,750.20-</u>	<u>9,879.22-</u>	<u>103.99</u>	<u>0.00</u>	<u>379.22</u>
<b>490000 REVENUE - OTHER FINANCIAL SOURCES/U</b>						
491300 SALE - SURP PROP/FIXED ASSET			32.20-			32.20
<b>Major Account 490000 Total</b>	<u>0.00</u>	<u>0.00</u>	<u>32.20-</u>	<u>0.00</u>	<u>0.00</u>	<u>32.20</u>
<b>BUDGETED REVENUE TOTAL</b>	<u>114,175.00-</u>	<u>9,100.20-</u>	<u>95,536.42-</u>	<u>83.68</u>	<u>0.00</u>	<u>18,638.58-</u>
<b>SUMMARY BY FUND TYPE - REVENUE</b>						
2 CASH FUNDS	114,175.00-	9,100.20-	95,536.42-	83.68		18,638.58-
<b>BUDGETED REVENUE TOTAL</b>	<u>114,175.00-</u>	<u>9,100.20-</u>	<u>95,536.42-</u>	<u>83.68</u>	<u>0.00</u>	<u>18,638.58-</u>

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	53105018.471100.		607824	03/06/25	RC	RB	NRPAB DEPOSIT 250306	7774750		25.00-
Total for Object			471100 SALE OF SERVICES									25.00-
25310	079	000	53105018.471121.		610043	03/19/25	RC	RB	NRPAB DEPOSIT 250318	7787658		25.00-
25310	079	000	53105018.471121.		611603	03/28/25	RC	RB	NRPAB DEPOSIT 250327	7798642		125.00-
Total for Object			471121 CONTINUING ED NEW FEES									150.00-
25310	079	000	53105018.471122.		607483	03/04/25	RC	RB	NRPAB DEPOSIT 250304	7770845		10.00-
Total for Object			471122 CONTINUING ED RENEWAL FEES									10.00-
25310	079	000	53105018.475150.		607483	03/04/25	RC	RB	NRPAB DEPOSIT 250304	7770845		300.00-
25310	079	000	53105018.475150.		608986	03/13/25	RC	RB	NRPAB DEPOSIT 250313	7782381		900.00-
Total for Object			475150 CERTIFIED GENERAL NEW FEES									1,200.00-
25310	079	000	53105018.475152.		608986	03/13/25	RC	RB	NRPAB DEPOSIT 250313	7782381		90.50-
25310	079	000	53105018.475152.		611603	03/28/25	RC	RB	NRPAB DEPOSIT 250327	7798642		45.25-
Total for Object			475152 FINGERPRINT FEES									135.75-
25310	079	000	53105018.475153.		607483	03/04/25	RC	RB	NRPAB DEPOSIT 250304	7770845		300.00-
25310	079	000	53105018.475153.		607824	03/06/25	RC	RB	NRPAB DEPOSIT 250306	7774750		600.00-
25310	079	000	53105018.475153.		608986	03/13/25	RC	RB	NRPAB DEPOSIT 250313	7782381		300.00-
Total for Object			475153 CERTIFIED RESIDENTIAL NEW									1,200.00-
25310	079	000	53105018.475161.		607483	03/04/25	RC	RB	NRPAB DEPOSIT 250304	7770845		50.00-
25310	079	000	53105018.475161.		608986	03/13/25	RC	RB	NRPAB DEPOSIT 250313	7782381		150.00-
25310	079	000	53105018.475161.		610043	03/19/25	RC	RB	NRPAB DEPOSIT 250318	7787658		350.00-
25310	079	000	53105018.475161.		610943	03/25/25	RC	RB	NRPAB DEPOSIT 250325	7794219		150.00-
25310	079	000	53105018.475161.		611603	03/28/25	RC	RB	NRPAB DEPOSIT 250327	7798642		100.00-
Total for Object			475161 TEMPORARY CERTIFIED GENERAL									800.00-
25310	079	000	53105018.475234.		607483	03/04/25	RC	RB	NRPAB DEPOSIT 250304	7770845		100.00-
25310	079	000	53105018.475234.		608986	03/13/25	RC	RB	NRPAB DEPOSIT 250313	7782381		600.00-
25310	079	000	53105018.475234.		610043	03/19/25	RC	RB	NRPAB DEPOSIT 250318	7787658		700.00-
25310	079	000	53105018.475234.		610943	03/25/25	RC	RB	NRPAB DEPOSIT 250325	7794219		300.00-
25310	079	000	53105018.475234.		611603	03/28/25	RC	RB	NRPAB DEPOSIT 250327	7798642		350.00-
Total for Object			475234 APPLICATION FEES									2,050.00-
25310	079	000	53105018.481100.		25409214	03/25/25	JE	G	OIP Feb 25 3.09483%	7793535		1,075.66-
Total for Object			481100 INVESTMENT INCOME									1,075.66-

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	53105018.484500.		607824	03/06/25	RC	RB	NRPAB DEPOSIT 250306	7774750		200.00-
Total for Object			484500 REIMB NON-GOVT SOURCES									200.00-
25310	079	000	53105018.511100.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		5,036.77
25310	079	000	53105018.511100.		3188118	03/19/25	T2	7	PAYROLL LABOR DISTRIBUTION	7780691		5,262.50
Total for Object			511100 PERMANENT SALARIES-WAGES									10,299.27
25310	079	000	53105018.511600.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		260.00
Total for Object			511600 PER DIEM PAYMENTS									260.00
25310	079	000	53105018.512100.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		91.32
25310	079	000	53105018.512100.		3188118	03/19/25	T2	7	PAYROLL LABOR DISTRIBUTION	7780691		397.57
Total for Object			512100 VACATION LEAVE EXPENSE									488.89
25310	079	000	53105018.512200.		3188118	03/19/25	T2	7	PAYROLL LABOR DISTRIBUTION	7780691		37.79
Total for Object			512200 SICK LEAVE EXPENSE									37.79
25310	079	000	53105018.512300.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		569.79
Total for Object			512300 HOLIDAY LEAVE EXPENSE									569.79
25310	079	000	53105018.515100.		3187837	03/05/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7767783		426.67
25310	079	000	53105018.515100.		3188119	03/19/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7780691		426.65
Total for Object			515100 RETIREMENT PLANS EXPENSE									853.32
25310	079	000	53105018.515200.		3187837	03/05/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7767783		407.80
25310	079	000	53105018.515200.		3188119	03/19/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7780691		387.94
Total for Object			515200 FICA EXPENSE									795.74
25310	079	000	53105018.515500.		3187837	03/05/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7767783		1,617.67
25310	079	000	53105018.515500.		3188119	03/19/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7780691		1,617.68
Total for Object			515500 HEALTH INSURANCE EXPENSE									3,235.35
25310	079	000	53105018.521100.		25285256	03/03/25	JE	G	NRPAB POSTAGE JAN 2025	7768321		72.85-
25310	079	000	53105018.521100.		25394102	03/19/25	JE	G	POSTAGE DUE FEB 2025	7789290		258.15
Total for Object			521100 POSTAGE EXPENSE									185.30
25310	079	000	53105018.521400.		57021285	03/03/25	PV	V	AS - OCIO - COMMUNICATIONS	7766952		144.39
25310	079	000	53105018.521400.		57188351	03/12/25	PV	V	AS - OCIO - IMSERVICES	7782616		1,000.04

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								1,224.43
25310	079	000	53105018.521500.		25244325	03/03/25	JE	G	NRPAB COPY SERV OCT-DEC 2024	7762748		210.55-
25310	079	000	53105018.521500.		2189605	03/03/25	OV	O	CORRECTIONAL SERVICES, DEPARTM	7768942		9.25
25310	079	000	53105018.521500.		2189966	03/03/25	OV	O	CORRECTIONAL SERVICES, DEPARTM	7769982		9.25
Total for Object			521500	PUBLICATION & PRINT EXP								192.05-
25310	079	000	53105018.522200.		25394297	03/20/25	JE	G	NRPAB ASC GRANT PCARD TRANSFER	7791095		422.50-
Total for Object			522200	CONFERENCE REGISTRATION								422.50-
25310	079	000	53105018.524600.		25255267	03/07/25	JE	G	RENT & LB530 MARCH 2025-OTHER	7764856		1,034.31
25310	079	000	53105018.524600.		25340418	03/11/25	JE	G	NRPAB RENT MARCH 2025	7780267		362.01-
25310	079	000	53105018.524600.		57245329	03/18/25	PV	V	SECRETARY OF STATE	7788801		18.23
Total for Object			524600	RENT EXPENSE-BUILDINGS								690.53
25310	079	000	53105018.524900.		25255267	03/07/25	JE	G	RENT & LB530 MARCH 2025-OTHER	7764856		348.91
25310	079	000	53105018.524900.		25340418	03/11/25	JE	G	NRPAB RENT MARCH 2025	7780267		122.12-
Total for Object			524900	RENT EXP-DEPR SURCHARGE								226.79
25310	079	000	53105018.531100.		25321940	03/07/25	JE	G	NRPAB ODP BUS SOL 11/2024	7777321		35.57-
Total for Object			531100	OFFICE SUPPLIES EXPENSE								35.57-
25310	079	000	53105018.554900.		57034817	03/03/25	PV	V	JIM BAIN APPRAISAL ASSOCIATES	7768512		437.50
25310	079	000	53105018.554900.		57070813	03/04/25	PV	V	REALCORP	7773790		500.00
25310	079	000	53105018.554900.		57135033	03/07/25	PV	V	NEBRASKA STATE PATROL	7777335		226.25
25310	079	000	53105018.554900.		57161824	03/11/25	PV	V	REALCORP	7780307		625.00
Total for Object			554900	OTHER CONTRACTUAL SERVICES								1,788.75
25310	079	000	53105018.571100.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		753.92-
Total for Object			571100	LODGING								753.92-
25310	079	000	53105018.571800.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		137.30-
Total for Object			571800	MEALS - TRAVEL STATUS								137.30-
25310	079	000	53105018.574500.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		575.30-
Total for Object			574500	PERSONAL VEHICLE MILEAGE								575.30-
Total for Business Unit		53105018	NE REAL PROPERTY APPRAISER									11,692.90

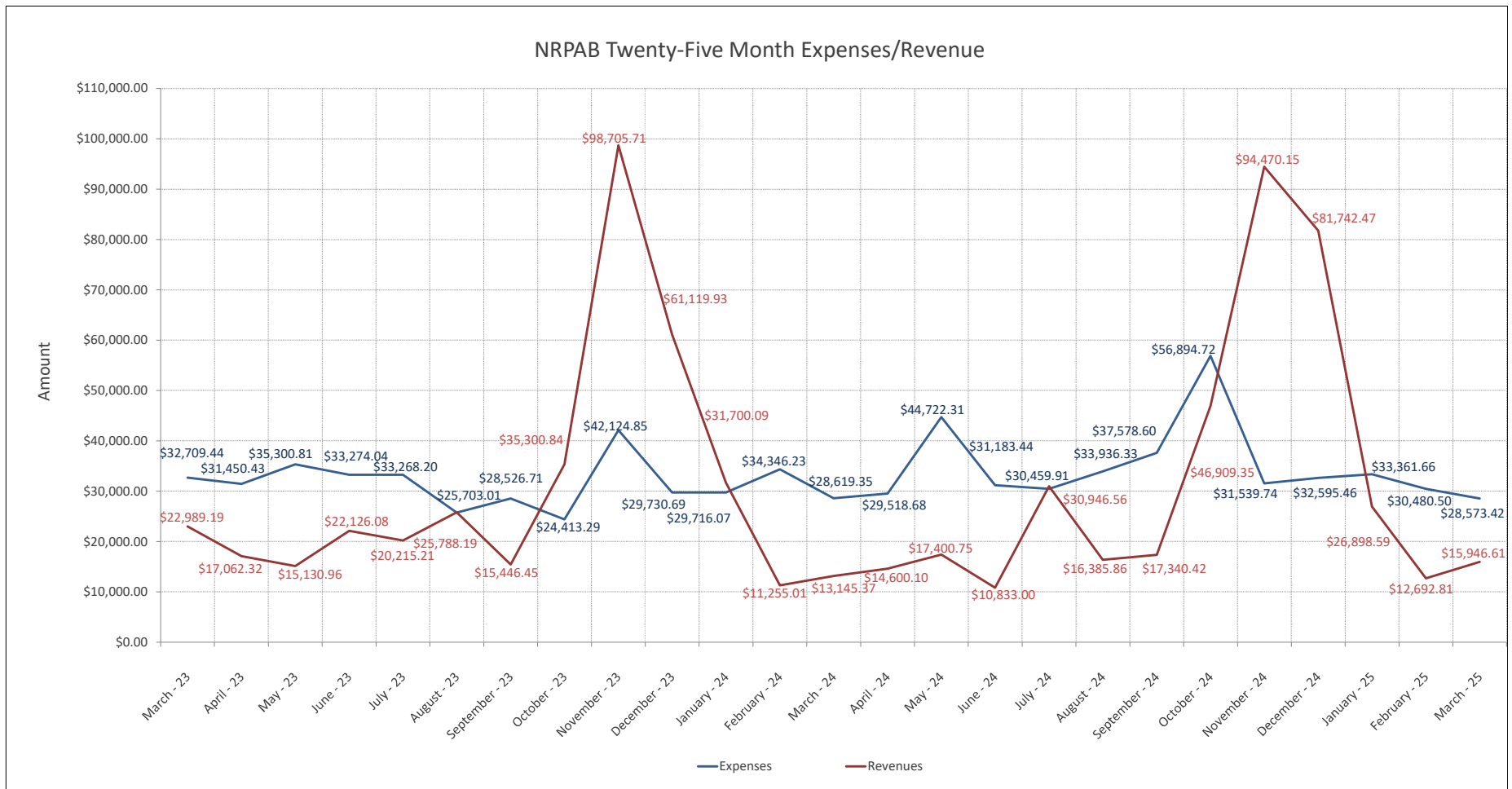


Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25320	079	000	53105200.475165.		607516	03/03/25	RC	RB	NRPAB AMC REN EFW DEP 250303	7770592		3,000.00-
25320	079	000	53105200.475165.		610458	03/20/25	RC	RB	NRPAB AMC REN EFW DEP 250320	7790804		1,500.00-
25320	079	000	53105200.475165.		611440	03/26/25	RC	RB	NRPAB AMC REN EFW DEP 250326	7796565		1,500.00-
Total for Object			475165 AMC REGISTERED RENEWAL									6,000.00-
25320	079	000	53105200.475166.		610942	03/25/25	RC	RB	NRPAB AMC DEPOSIT 250325	7794227		350.00-
Total for Object			475166 FED REG AMC RPT FORM PROC FEES									350.00-
25320	079	000	53105200.481100.		25409214	03/25/25	JE	G	OIP Feb 25 3.09483%	7793535		750.20-
Total for Object			481100 INVESTMENT INCOME									750.20-
25320	079	000	53105200.484500.		607823	03/05/25	RC	RB	NRPAB AMC DEPOSIT 240306	7775458		500.00-
Total for Object			484500 REIMB NON-GOVT SOURCES									500.00-
25320	079	000	53105200.485101.		607823	03/05/25	RC	RB	NRPAB AMC DEPOSIT 240306	7775458		1,500.00-
Total for Object			485101 AMC FORFEITS & PENALTY									1,500.00-
25320	079	000	53105200.511100.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		2,712.12
25320	079	000	53105200.511100.		3188118	03/19/25	T2	7	PAYROLL LABOR DISTRIBUTION	7780691		2,833.89
Total for Object			511100 PERMANENT SALARIES-WAGES									5,546.01
25320	079	000	53105200.511600.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		140.00
Total for Object			511600 PER DIEM PAYMENTS									140.00
25320	079	000	53105200.512100.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		49.17
25320	079	000	53105200.512100.		3188118	03/19/25	T2	7	PAYROLL LABOR DISTRIBUTION	7780691		213.87
Total for Object			512100 VACATION LEAVE EXPENSE									263.04
25320	079	000	53105200.512200.		3188118	03/19/25	T2	7	PAYROLL LABOR DISTRIBUTION	7780691		20.35
Total for Object			512200 SICK LEAVE EXPENSE									20.35
25320	079	000	53105200.512300.		3187836	03/05/25	T2	7	PAYROLL LABOR DISTRIBUTION	7767783		306.81
Total for Object			512300 HOLIDAY LEAVE EXPENSE									306.81
25320	079	000	53105200.515100.		3187837	03/05/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7767783		229.72
25320	079	000	53105200.515100.		3188119	03/19/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7780691		229.74
Total for Object			515100 RETIREMENT PLANS EXPENSE									459.46
25320	079	000	53105200.515200.		3187837	03/05/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7767783		

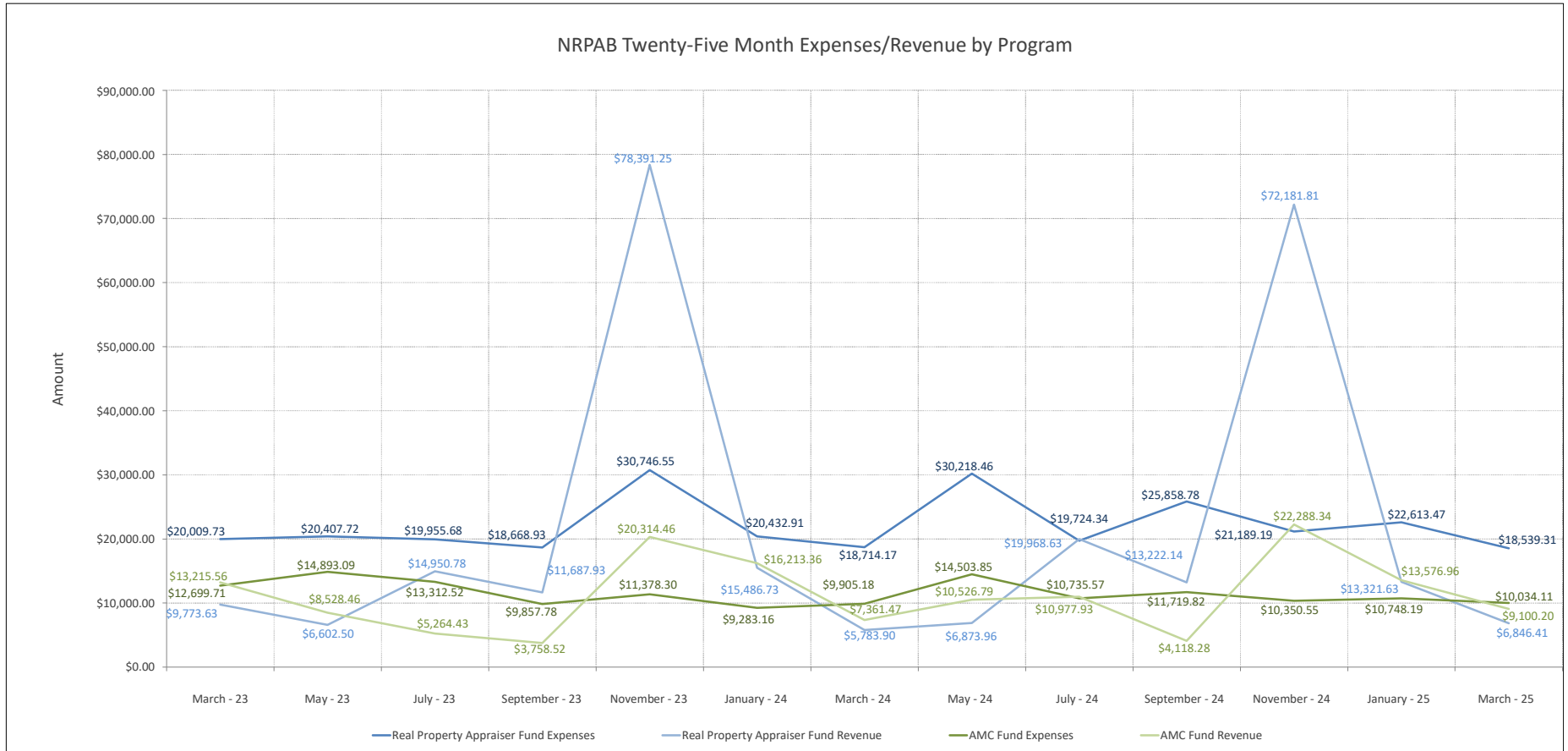
Fund	Program	Sub-Program	Account Number	Sub-ledger	Doc Number	Tran Date	Tran Type	Batch Type	Payee/Explanation	Batch Number	Posted Code	Month to Date
25320	079	000	53105200.515200.		3188119	03/19/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7780691		208.87
Total for Object			515200 FICA EXPENSE									428.46
25320	079	000	53105200.515500.		3187837	03/05/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7767783		871.09
25320	079	000	53105200.515500.		3188119	03/19/25	T3	7	ACTUAL BURDEN JOURNAL ENTRIES	7780691		871.08
Total for Object			515500 HEALTH INSURANCE EXPENSE									1,742.17
25320	079	000	53105200.521100.		25285256	03/03/25	JE	G	NRPAB POSTAGE JAN 2025	7768321		72.85
Total for Object			521100 POSTAGE EXPENSE									72.85
25320	079	000	53105200.521400.		57021285	03/03/25	PV	V	AS - OCIO - COMMUNICATIONS	7766952		77.74
25320	079	000	53105200.521400.		57188351	03/12/25	PV	V	AS - OCIO - IMSERVICES	7782616		581.56
Total for Object			521400 CIO CHARGES									659.30
25320	079	000	53105200.521500.		25244325	03/03/25	JE	G	NRPAB COPY SERV OCT-DEC 2024	7762748		210.55
Total for Object			521500 PUBLICATION & PRINT EXP									210.55
25320	079	000	53105200.522200.		25394297	03/20/25	JE	G	NRPAB ASC GRANT PCARD TRANSFER	7791095		227.50-
Total for Object			522200 CONFERENCE REGISTRATION									227.50-
25320	079	000	53105200.524600.		25340418	03/11/25	JE	G	NRPAB RENT MARCH 2025	7780267		362.01
25320	079	000	53105200.524600.		57245329	03/18/25	PV	V	SECRETARY OF STATE	7788801		9.82
Total for Object			524600 RENT EXPENSE-BUILDINGS									371.83
25320	079	000	53105200.524900.		25340418	03/11/25	JE	G	NRPAB RENT MARCH 2025	7780267		122.12
Total for Object			524900 RENT EXP-DEPR SURCHARGE									122.12
25320	079	000	53105200.531100.		25321940	03/07/25	JE	G	NRPAB ODP BUS SOL 11/2024	7777321		35.57
Total for Object			531100 OFFICE SUPPLIES EXPENSE									35.57
25320	079	000	53105200.541500.		57280022	03/20/25	PV	V	PEETZ KOERWITZ & LAFLEUR PC LL	7791271		627.50
Total for Object			541500 LEGAL SERVICES EXPENSE									627.50
25320	079	000	53105200.554900.		57135033	03/07/25	PV	V	NEBRASKA STATE PATROL	7777335		45.25
Total for Object			554900 OTHER CONTRACTUAL SERVICES									45.25
25320	079	000	53105200.571100.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		405.96-
Total for Object			571100 LODGING									405.96-

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	53105200.571800.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		73.93-
Total for Object			571800 MEALS - TRAVEL STATUS									73.93-
25320	079	000	53105200.574500.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		309.77-
Total for Object			574500 PERSONAL VEHICLE MILEAGE									309.77-
Total for Business Unit		53105200	AMC LICENSING									933.91

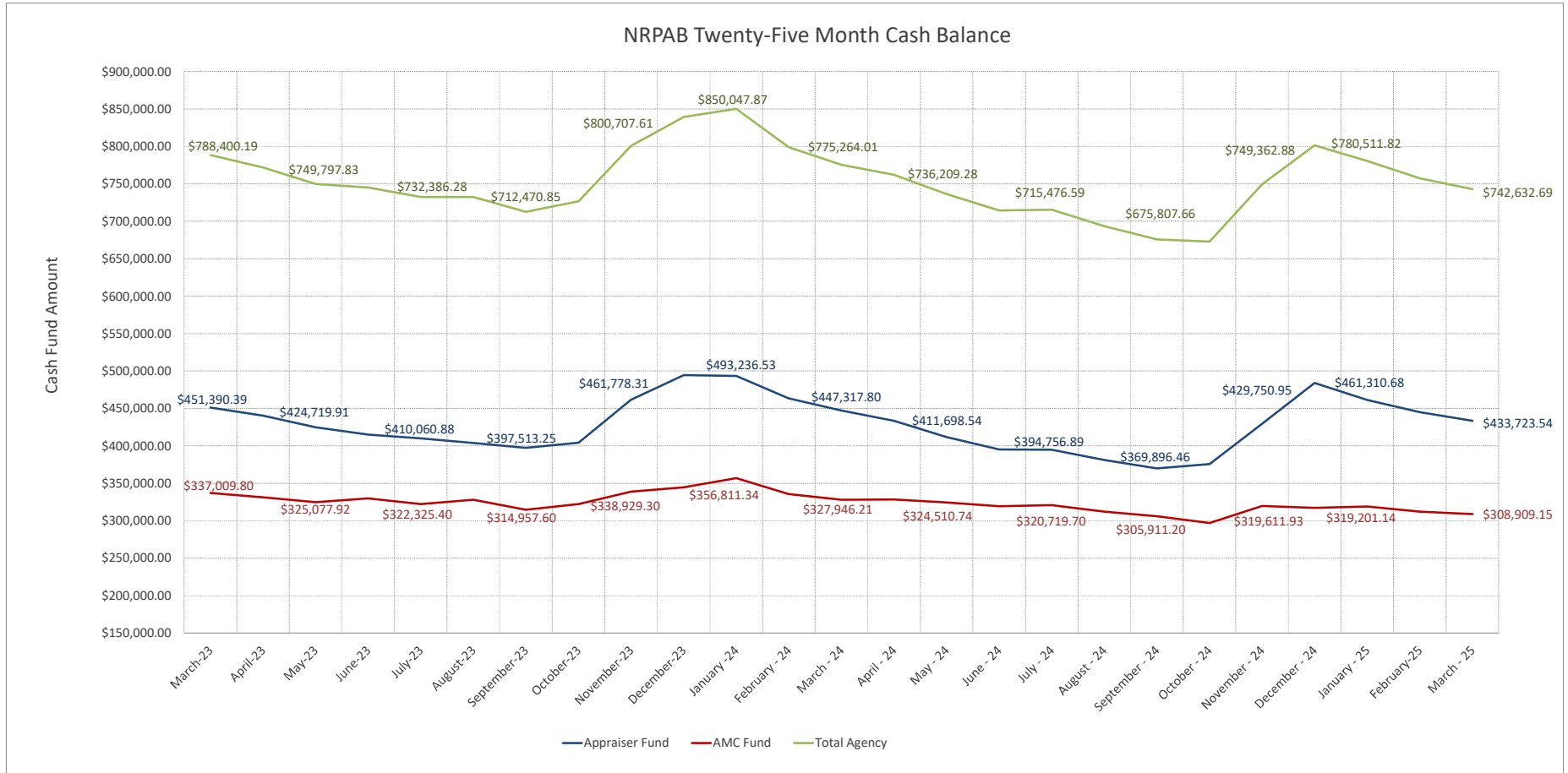
# Financial Report and Considerations - Financial Charts



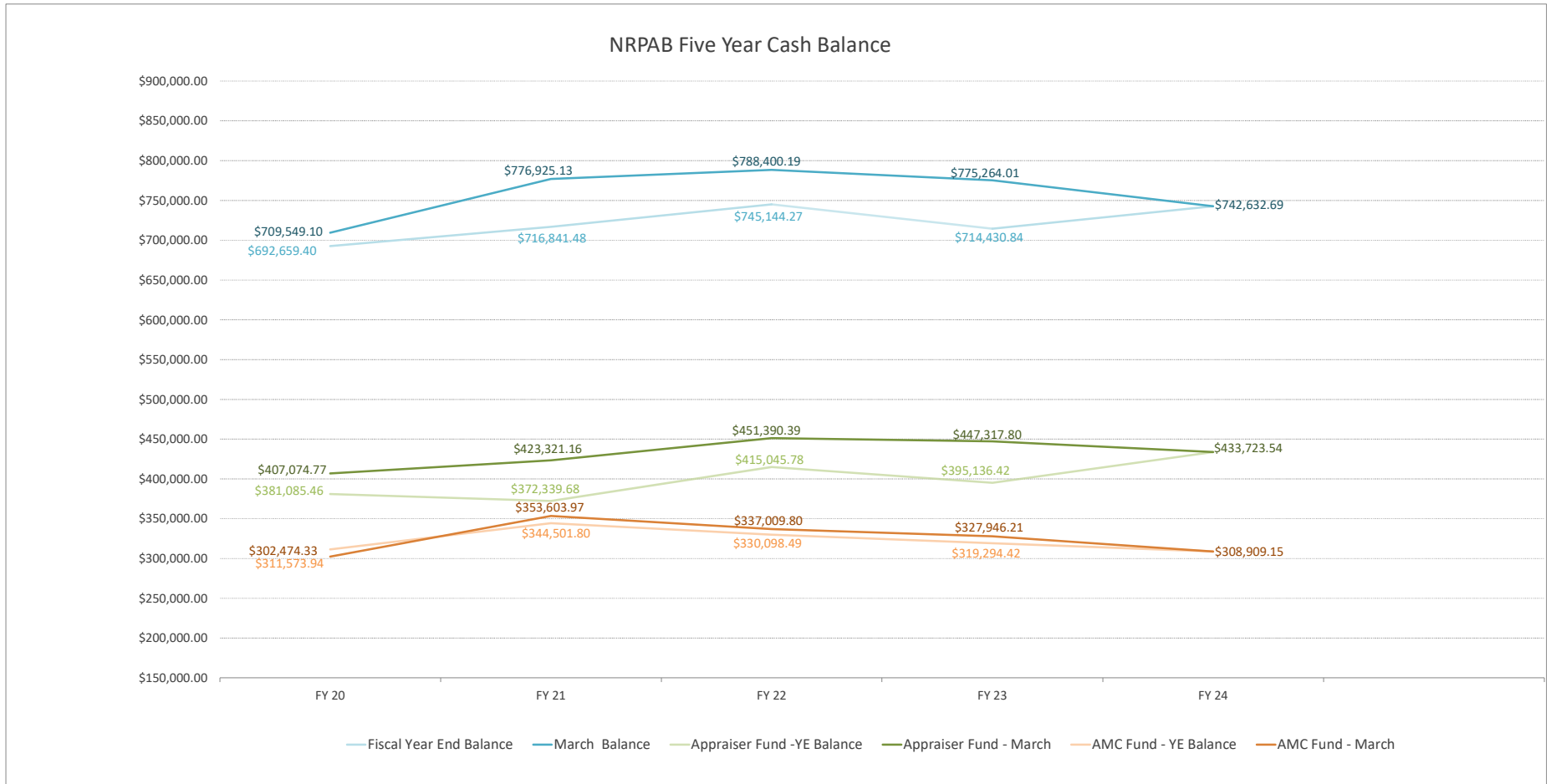
# Financial Report and Considerations - Financial Charts



# Financial Report and Considerations - Financial Charts



# Financial Report and Considerations - Financial Charts





# Agenda Item Summary

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**Prepared By:** Colby Falls

**Title:** Business Programs Manager

**Date:** 3/25/2025

**Agenda Section:** Financial Report and Considerations

**Agenda Item Identification Number:**

**Subject:** Logitech H390 On-Ear USB Headset with Noise-Cancelling Mic for BPM

**Description:** Approval of transfer of funds for Logitech H390 On-Ear USB Headset with Noise-Cancelling Mic from Other Operating Expenses to Voice Equip

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## SUMMARY

Approval for funding in the amount of \$28.25 requested to be transferred from Other Operating Expenses (559100) to Voice Equip (532260) for the purchase of one Logitech H390 On-Ear USB Headset with Noise-Cancelling Mic through the ODP Business Solutions (Exhibit #1). The CIO approved headset is under the open purchase authority for office supplies through ODP Business Solutions. Although the item would be cleared as an office supply (item listed as an unrestricted office supply) for purchase, it will need to be coded as Voice Equipment. The Board currently has no funding allocated to Voice Equipment. Authorization for this purchase was granted by Chairperson Gerdes on March 25, 2025 (Exhibit #2).

## RELEVANT LAWS/RULES/GUIDANCE DOCUMENTS/INTERNAL PROCEDURES

None

## DISCIPLINARY/WRITTEN ADVISORY HISTORY

None

## EXHIBITS

See attached.



## Order Details

### Delivery

**Attention:**  
 REAL PROPERTY APPRAISER BRD  
 Colby Falls  
 301 Centennial Mall S  
 1st Floor Nsob  
 Lincoln, NE 68508-2529 USA

**Phone:** (402) 471-9015  
**Email:** colby.falls@nebraska.gov  
**Ship to ID:** 530000

### Payment

**Account #:** 84041595  
**REQ#:** 250325  
**BUSUNIT:** 53105018.531100  
**Amount:** \$32.95  
**Type:** Account Billing

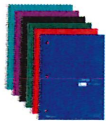
### Additional Info

**Ordered By:** COLBY FALLS  
**Phone:** (402) 471-9015  
**Last Updated:** 03/25/2025  
**Updated By:** COLBY FALLS

## Shipment 2 of 3

ORDER NUMBER	ORDER STATUS	BUSUNIT	TOTAL
414732338-001	Processing	53105018.531100	\$32.95

### Processing



Office Depot® Wirebound Notebooks, 8 1/2" x 11", 1 Subject, College Ruled, 100 Sheets, Assorted Colors, Pack Of 6 Notebooks  
 Item #3835061

Qty: 1 @ \$4.70 / pack

**\$4.70**

 Contract Items



Logitech H390 On-Ear USB Headset with Noise-Cancelling Mic, Black

Item #607890

Qty: 1 @ \$28.25 / each

**\$28.25**

 Contract Items

Shipment 2



414732338 001

Item Subtotal: \$32.95

**Order Total \$32.95**

## Kohtz, Tyler

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**From:** Cody Gerdes <cgerdes@gpappraisal.com>  
**Sent:** Tuesday, March 25, 2025 9:51 AM  
**To:** Kohtz, Tyler  
**Cc:** Kevin Hermsen; rodney.johnson@ufarm.com; Derek Minshull  
**Subject:** Re: Colby USB Headset Request

I do not have a problem with approving this purchase.

Cody Gerdes, MAI | Certified General Real Estate Appraiser | Nebraska

Great Plains Appraisal, Inc.

115 Cherry Hill Boulevard | Lincoln, Nebraska 68510

Phone: [402-476-1144](tel:402-476-1144) | Fax: [402-476-7171](tel:402-476-7171)

[cgerdes@gpappraisal.com](mailto:cgerdes@gpappraisal.com)

On Tue, Mar 25, 2025 at 9:44 AM Kohtz, Tyler <[tyler.kohtz@nebraska.gov](mailto:tyler.kohtz@nebraska.gov)> wrote:

Cody,

Colby has requested a USB headset to use for Webex meetings. The CIO approved headset is under our open purchase authority for office supplies through Office Depot. Although it would be cleared as an office supply (item listed as an unrestricted office supply), it will need to be coded as Voice Equipment. The Board currently has no funding allocated to Voice Equipment. As such, I am requesting approval for a Voice Equipment expenditure in the amount of \$28.25 for a USB headset. I would present the budget amendment to transfer this amount from Other Operating Expenses to Voice Equipment Expenditures at the April meeting.

Please let me know if you have any questions or if you would prefer that this request go before the full Board.

Thanks,

*Tyler N. Kohtz, Director*

*Nebraska Real Property Appraiser Board*

*301 Centennial Mall South, First Floor*

*Lincoln, NE 68509-4963*

*Phone: (402) 471-9015*

*Email: [tyler.kohtz@nebraska.gov](mailto:tyler.kohtz@nebraska.gov)*

*Web site: [appraiser.ne.gov](http://appraiser.ne.gov)*

 *[Visit NRPAB on Facebook](#)*





# Agenda Item Summary

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**Prepared By:** Colby Falls

**Title:** Business Programs Manager

**Date:** 3/25/2025

**Agenda Section:** Financial Report and Considerations

**Agenda Item Identification Number:**

**Subject:** Fifteen-Hour National Uniform Standards of Professional Appraisal Practice Course

**Description:** Approval of transfer of funds for attendance of Fifteen-Hour National Uniform Standards of Professional Appraisal Practice Course for attendance by EPM Sims and LPM Loll

---

## SUMMARY

Approval for funding in the amount of \$720.00 requested to be transferred from Other Operating Expenses (559100) to Educational Services (547100) for the purchase of two (2) Fifteen-hour National Uniform Standards of Professional Appraisal Practice Courses offered by the Appraisal Institute for EPM Sims and LPM Loll to each attend by asynchronous or synchronous delivery (Exhibit #1).

## RELEVANT LAWS/RULES/GUIDANCE DOCUMENTS/INTERNAL PROCEDURES

None

## DISCIPLINARY/WRITTEN ADVISORY HISTORY

None

## EXHIBITS

See attached.



## 2024 15-Hour Equivalent USPAP Course

[More Info](#)

[REGISTER](#)

The Appraisal Institute 2024 15-Hour Equivalent USPAP Course covers the fundamentals of ethical behavior and competent performance expected of professional appraisers. Designed to comply with requirements for state licensed/certified appraisers, the course highlights the role of the appraiser and the impartiality necessary while acting in that role. Participants will learn how the requirements of ...

Date: **On Demand**

Sponsor: **Appraisal Institute**

Instructor: **Craig M. Harrington,  
SRA, AI-RRS  
Richard L. Borges, II,  
MAI, SRA, AI-GRS, AI-RRS**

Class Time: **15**

Exam Time: **1 Hour**

Full Price: **\$360.00**

AI Price: **\$315.00**

ONLINE

Topics: Standards and Ethics | Begin Your Career | Continuing education | USPAP Education

March 25, 2025

Nebraska Real Property Appraiser Board  
301 Centennial Mall South, First Floor  
PO Box 94963  
Lincoln, NE 68509-4963

Dear Mr. Kohtz:

I'm writing this letter to first thank the Agency for the opportunity to provide appraisal review services as a contractor for appraiser credentialing and/or investigation purposes. It's been a pleasure working with the Agency to date and appreciate what the Agency continues to do for the integrity of the appraisal profession. It's a profession to be proud of 😊.

I recently was asked to complete a review on behalf of the Agency to assist with its evaluation of Applicant Number CG23036. Due to the complexity of the appraisal review assignment, the services rendered incurred a total of twenty hours to complete. As the Agency is aware, this is more than \$875 noted in Section 3 of the Agency's Appraisal Review Service Agreement at the rate of \$125/hour.

Prior to the above-mentioned appraisal review assignment, I completed a review on behalf of the Agency to assist with Investigation #23-12. Although I consider some of the time spent getting familiar with the Agency's review process, I'd incurred 35 hours on that appraisal review assignment due to the complexity of the assignment and went forward with billing at the rate not to exceed \$875.00.

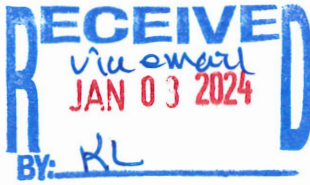
With the extenuating circumstances with this last review and time spent, I'm asking the Agency to consider approving additional compensation to meet the 20 hours spent, if the Agency feels that's appropriate based on the level of analysis contained in the appraisal review. I do understand that us contractors take on that risk when an agreement to do the assignment is made. However, I'd be interested to learn how that fee is determined and if other peers run into this issue. I can see this fee being appropriate for a typical form report, but not one written for litigation and/or commercial purposes. When allocating the time spent reading the report, walking through the analysis & calculations, wrapping your head around the report, and filling out the USPAP Compliance Review and Detailed Explanation of Findings form, it's looking to be impossible in keeping the hours at or below a maximum of seven.

If you have any questions or would like to discuss in more detail, please feel free to contact me at 402.890.6095 or [sprackling5@gmail.com](mailto:sprackling5@gmail.com). Certainly, appreciate the Agency's time on this as well.

Respectfully,

  
Shana L. Sprackling

NE Certified General Real Property Appraiser CG270098



112037



**NEBRASKA REAL PROPERTY APPRAISER CREDENTIALING APPLICANT  
APPRAISAL REVIEW SERVICES AGREEMENT**

This Nebraska Real Property Appraiser Credentialing Applicant Appraisal Review Services Agreement (“Agreement”) is entered into between the Nebraska Real Property Appraiser Board (“Agency”) and SHANA L SPRACKLING (“Contractor”), who holds credential number CG270098 issued by the Nebraska Real Property Appraiser Board, and is an employee of SPRACKLING REAL ESTATE SOLUTIONS LLC located at 8700 GOLD DUST RD, LINCOLN, NE 68526-9788, whose Employer Identification Number (EIN) is 99-1260343.

Contractor shall complete appraisal review report in accordance with Standards 3 and 4 of the National Uniform Standards of Professional Appraisal Practice (“USPAP”), and provide technical expertise to the Agency as needed to assist the Board with its evaluation of the listed applicant’s experience for credentialing as a real property appraiser in the State of Nebraska.

Applicant Number: CG23036

Credential Applied For: CERTIFIED GENERAL REAL PROPERTY APPRAISER

Appraisal Report: 1024 AVENUE E, WISNER, NE (COMMERCIAL)

**THE PARTIES MUTUALLY AGREE AS FOLLOWS:**

**SECTION 1. QUALIFICATIONS**

- A. Contractor shall meet the following qualifications at the time this Agreement between Contractor and the Agency is executed:
1. Contractor shall possess an active credential as a certified residential or certified general real property appraiser in the State of Nebraska, or obtain a temporary credential as a certified residential or certified general real property appraiser prior to engaging in real property appraisal activity in this state.
  2. Contractor's real property appraiser credential, or appraiser credential, license, registration, or certification issued by any other jurisdiction, shall not have been disciplined, revoked, suspended, or surrendered in lieu of disciplinary action pending or threatened within the immediate two-year period preceding the date of this contract.
  3. Disciplinary proceedings pending against Contractor's real property appraiser credential, or appraiser credential, license, registration, or certification issued by any other jurisdiction shall be disclosed.
  4. Contractor's real property appraiser credential, or appraiser credential, license, registration, or certification issued by any other jurisdiction shall not be under investigation.
  5. Contractor shall not have been convicted of any crime of fraud, dishonesty, breach of trust, money laundering, misrepresentation, or deceit, including a conviction based upon a plea of guilty or nolo contendere involving real estate, financial services, or in the making of an appraisal.
  6. Contractor shall possess the ability necessary to communicate effectively, concisely, and objectively with Board staff and as an expert witness if required.
  7. Contractor shall possess a reputation for honesty, trustworthiness, and producing quality work within the appraiser industry.
  8. Contractor shall have completed the Seven-hour National Uniform Standards of Professional Appraisal Practice Update Course as approved by the Appraiser Qualifications Board applicable to the development and reporting of the appraisal report(s) subject to review under this agreement.
- B. The Nebraska Real Property Appraiser Board shall be notified immediately in writing if Contractor no longer meets the qualifications in place at the time this Agreement between Contractor and the Agency is executed. If any party makes such request, Contractor must promptly disqualify themselves.



## SECTION 2. SCOPE OF SERVICE

- A. Contractor shall become familiar with the appropriate federal requirements, including but not limited to USPAP, state statutes, and regulations relevant to this assignment.
- B. If necessary, Contractor shall become familiar with the procedures generally applicable to administrative hearings, and become familiar with appropriate state statutes and regulations relevant to administrative hearings.
- C. Contractor shall be competent and available to perform the services required in this contract in an ethical manner, and must discern those cases in which they may be disqualified from proceeding and must promptly disqualify themselves, regardless of whether there is a request to do so.
- D. Contractor shall comply with all applicable federal, state, and local laws, statutes, codes, ordinances, standards, policies, regulations, and rules in effect during the term of this Agreement. Contractor shall also not discriminate, in any way, against any person on the basis of race, color, religious creed, national origin, ancestry, sex, age, physical handicap, medical condition, or marital status in connection with or related to the performance of this Agreement.
- E. Contractor shall maintain all information, documentation, and records required to perform services. In addition, Contractor shall provide all information, documentation, and records to the Agency at the Agency's request.
- F. The services provided are deemed personal services and shall be performed only by Contractor and may not be assigned in any manner.
- G. Contractor shall work in their own home and office, except when required otherwise by the Agency for purposes pertaining to this matter, or to attend an administrative hearing concerning this matter.
- H. Unless otherwise agreed to by the Agency in writing, Contractor shall complete review of the subject report for compliance with the Ethics Rule, Competency Rule, Scope of Work Rule, Jurisdictional Exception Rule, Standards Rule 1, and Standards Rule 2; and shall develop and communicate conclusions of compliance or noncompliance in accordance with Standards 3 and 4 of USPAP for the subject report within 30 days for a residential property, 45 days for agricultural property, or 60 days for any other type of property. All conclusions shall be clear, concise, unremittingly impartial, professional, and ethical.
  1. Contractor shall communicate their findings for each specific rule in writing and shall not report only that the rule was met or not met. Where applicable, Contractor shall communicate their analysis of the methods and techniques employed that are necessary to produce a credible report. Contractor shall state specific violations of USPAP, reference the proper rule, and include appropriate documentation and/or information to substantiate each finding.

2. Contractor shall obtain any necessary data, documentation, and/or information required to substantiate each finding. If physical evidence or additional background information is required to substantiate a finding that cannot be obtained in Contractor's everyday course of business, Contractor shall contact the Agency for determination of methodology or person best suited to obtain such physical evidence or background information.
  3. The Agency reserves the right to require clarification on any findings, and may also require additional documentation and/or information for substantiation of any findings.
  4. The effective date of Contractor's review report is the date of the subject report under review. Certification date of Contractor's review report is the actual date the review report was completed.
  5. The client, and only intended user, is the Nebraska Real Property Appraiser Board.
  6. The intended use of the review report is to assist the Agency in establishing compliance or noncompliance with the minimum standards of USPAP for the purpose of the Board's evaluation of qualifications for credentialing.
  7. Contractor shall not offer their opinion concerning the overall state of the subject report reviewed by them regarding compliance or noncompliance with USPAP.
  8. Contractor shall not offer their opinion concerning analysis, conclusions, practices, or techniques not related or pertinent to the minimum standards in USPAP.
  9. Contractor shall not advocate for a specific result or conclusion concerning this matter, and shall not develop and communicate a conclusion with the intent to favor unduly the Nebraska Real Property Appraiser Board or the applicant.
  10. Contractor shall not use inflammatory language in the development or communication of their conclusions.
- K. This matter may proceed to an administrative hearing. During the litigation process, Contractor may be requested to defend any findings as a witness for the Nebraska Real Property Appraiser Board.

### **SECTION 3. COMPENSATION**

- A. Subject to any limitations set forth in the Agreement, the Nebraska Real Property Appraiser Board shall pay the Contractor \$125.00 per hour for such services provided. Payment may be made to Contractor's Employer identified on Page 1 of this Agreement. The total compensation for services provided shall not exceed \$875.00. In the case of extenuating circumstances, or if the matter proceeds to hearing, the Board reserves the right to renegotiate the total compensation or hourly rate set forth in this Agreement. Upon completion of the services, Contractor shall provide an invoice to the Agency, which outlines applicant number, appraisal reports reviewed, services performed, hours billed, and total amount billed.
- B. Contractor shall only be reimbursed for the cost of travel and lodging expenses pre-approved by the Agency's Director. No other expenses are reimbursable. Costs for travel and lodging shall be claimed, and reimbursements shall be made, in accordance with the Nebraska Real Property Appraiser Board and the State of Nebraska policies.
- C. Contractor is an independent contractor and is not an employee of the State of Nebraska. Consequently, Contractor is not entitled to any fringe benefits or remuneration not specified in this Agreement.

### **SECTION 4. CONFLICTS OF INTEREST**

- A. Contractor covenants that they have not acquired any interest, directly or indirectly, which would conflict in any manner with the interests of the Nebraska Real Property Appraiser Board or the applicant, or which would in any way hinder Contractor's performance of services under this Agreement.
- B. Contractor agrees to avoid at all times conflicts of interest or the appearance of any conflicts of interest with the interests of the Nebraska Real Property Appraiser Board or applicant in the performance of this Agreement. If conflicts of interest or the appearance of any conflicts of interests develop, all parties relevant to the matter shall be notified immediately in writing. If any party makes such request, Contractor must promptly disqualify themselves.

### **SECTION 5. CONFIDENTIALITY**

- A. All information gained or work product produced by Contractor in performance of this Agreement shall be considered confidential unless such information is in the public domain or already known to Contractor. Contractor shall not release, disclose, or discuss any such information or work product to persons or entities other than the Agency or its legal representative without prior written authorization from the Agency's Director, except as may be required by law.
- B. Contractor shall promptly notify Agency should Contractor be served with any summons, complaint, subpoena, notice of deposition, request for documents, interrogatories, request for admissions or other discovery request, court order, or subpoena from any party regarding this Agreement and work performed thereunder. The Nebraska Real Property Appraiser Board has no obligation to represent Contractor or be present at any deposition, hearing, or similar proceeding.

- C. Contractor is not authorized by the Nebraska Real Property Appraiser Board to comment publicly on Nebraska Real Property Appraiser Board matters. All such inquiries should be directed to the Nebraska Real Property Appraiser Board's Director.
- D. If Contractor provides any information or work product in violation of this Agreement, the Nebraska Real Property Appraiser Board shall have the right to reimbursement and indemnity from Contractor for any damages, costs, and fees, including attorney's fees, caused by or incurred as a result of Contractor's conduct.

#### **SECTION 6. INDEMNIFICATION**

- A. Contractor shall indemnify, defend, and hold the Nebraska Real Property Appraiser Board harmless from all actions, proceedings, claims, demands, costs, damages, attorney's fees, and all other liabilities and expenses of any kind from any source which may arise out of performance of this Agreement, if caused by the tortious acts or omissions of Contractor.

#### **SECTION 7. TERMINATION; DEFAULT**

- A. If either Contractor or Nebraska Real Property Appraiser Board fails to perform any material obligation under this Agreement, then, in addition to any other remedies, either Contractor or Nebraska Real Property Appraiser Board may terminate this Agreement immediately upon written notice.
- B. Either party shall have the right to terminate this Agreement upon thirty (30) days' notice to the other party.
- C. Upon termination of the Agreement by either Contractor or Nebraska Real Property Appraiser Board, Contractor shall furnish to Agency a final invoice for work performed under this agreement.
- D. In the event that Contractor is in default under the terms of this Agreement, Nebraska Real Property Appraiser Board shall not have any obligation or duty to continue compensating Contractor for any work performed after the date of default and may terminate this Agreement immediately by written notice to the Contractor. It shall constitute an event in default if Contractor, due to death, disability, or other unforeseen circumstance is unable to perform services for ten (10) or more days.

#### **SECTION 8. MODIFICATION; WAIVER**

- A. No amendment to or modification of this Agreement shall be valid unless made in writing and approved by Contractor and Agency.
- B. Waiver by any party to this Agreement of any term, condition, or covenant shall not constitute a waiver of any other term, condition, or covenant. Waiver by any party of any breach of the provisions of this Agreement shall not constitute a waiver of any other provision, nor a waiver of any subsequent breach or violation of any provision of this Agreement. Acceptance by Agency of any work or services by Contractor shall not constitute a waiver of any of the provisions of this Agreement.

**SECTION 9. LAW TO GOVERN; SEVERABILITY**

- A. This Agreement shall be interpreted, construed, and governed according to the laws of the State of Nebraska.
- B. If a term, condition, or covenant of this Agreement is declared or determined by any court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions of this Agreement shall not be affected thereby and the Agreement shall be read and construed without the invalid, void, or unenforceable provision(s).

**SECTION 10. EXECUTION**

Contractor represents and warrants that they have the qualifications, experience, and facilities necessary to perform properly the services required under this Agreement in an objective, independent, ethical, thorough, competent, and professional manner. Contractor shall at all times faithfully, competently, and to the best of their ability, experience, and talent, perform all services described herein. In meeting their obligations under this Agreement, Contractor shall employ, at a minimum, generally accepted standards and practices utilized by persons engaged in providing services similar to those required of Contractor under this Agreement. Contractor agrees to perform all services in an expeditious manner and without unnecessary delay. Contractor shall comply with all laws and court rules and comply when laws or rules are repealed, amended, or newly chaptered or adopted, including qualification standards required for the performance of the services.

**IT IS THEREFORE AGREED** that the parties hereto have caused this Agreement between Contractor and the Agency to be executed for three years or until final disposition of the application in question by the signature of the Director on:

THIS 6 day of January, 2025.

**CONTRACTOR**

Shana L Sprackling      66270098      1-2-2025  
 SHANA L SPRACKLING, Contractor      Credential Number      Date

**NEBRASKA REAL PROPERTY APPRAISER BOARD**

Tyler N. Kohtz      1/6/25  
 Tyler N. Kohtz, Director      Date

STATE OF NEBRASKA  
Department of Administrative Services  
Accounting Division  
Budget Status Report  
As of 03/31/25

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

Percent of Time Elapsed = 75.07

ACCOUNT CODE DESCRIPTION	BUDGETED AMOUNT	CURRENT MONTH ACTIVITY	YEAR-TO-DATE ACTUALS	PERCENT OF BUDGET	ENCUMBERANCES	VARIANCE
<b>BUDGETED FUND TYPES - EXPENDITURES</b>						
<b>520000 OPERATING EXPENSES</b>						
521400 CIO CHARGES	54,500.00					54,500.00
522200 CONFERENCE REGISTRATION	1,300.00	650.00	650.00	50.00		650.00
<b>Major Account 520000 Total</b>	<b>55,800.00</b>	<b>650.00</b>	<b>650.00</b>	<b>1.16</b>	<b>0.00</b>	<b>55,150.00</b>
<b>570000 TRAVEL EXPENSES</b>						
571100 LODGING	1,160.00	1,159.88	1,159.88	99.99		.12
571800 MEALS - TRAVEL STATUS	188.00	211.23	211.23	112.36		23.23-
574500 PERSONAL VEHICLE MILEAGE	885.00	885.07	885.07	100.01		.07-
<b>Major Account 570000 Total</b>	<b>2,233.00</b>	<b>2,256.18</b>	<b>2,256.18</b>	<b>101.04</b>	<b>0.00</b>	<b>23.18-</b>
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>58,033.00</b>	<b>2,906.18</b>	<b>2,906.18</b>	<b>5.01</b>	<b>0.00</b>	<b>55,126.82</b>
<b>SUMMARY BY FUND TYPE - EXPENDITURES</b>						
4 FEDERAL FUNDS	58,033.00	2,906.18	2,906.18	5.01		55,126.82
<b>BUDGETED EXPENDITURES TOTAL</b>	<b>58,033.00</b>	<b>2,906.18</b>	<b>2,906.18</b>	<b>5.01</b>	<b>0.00</b>	<b>55,126.82</b>

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
40000	079	000	53105400.522200.		25394297	03/20/25	JE	G	NRPAB ASC GRANT PCARD TRANSFER	7791095		650.00
Total for Object			522200 CONFERENCE REGISTRATION									650.00
40000	079	000	53105400.571100.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		1,159.88
Total for Object			571100 LODGING									1,159.88
40000	079	000	53105400.571800.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		211.23
Total for Object			571800 MEALS - TRAVEL STATUS									211.23
40000	079	000	53105400.574500.		25394017	03/18/25	JE	G	NRPAB ASC GRANT REIMB TRANSFER	7788745		885.07
Total for Object			574500 PERSONAL VEHICLE MILEAGE									885.07
Total for Business Unit		53105400	ASC GRANT									2,906.18
Total For Grant Project #			SSG2024NE01									2,906.18
Total for Division		000										2,906.18
Total for Agency		053	REAL PROPERTY APPRAISER BD									2,906.18

**NEBRASKA REAL PROPERTY APPRAISER BOARD**  
**EDUCATION APPLICANTS**  
**TABLE OF CONTENTS**

April 17, 2025

<i>Rescission of Approval of Education Activities</i>				
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2202429.02	Appraisal Institute	Using Spreadsheet Programs in Real Estate Appraisals – Synchronous	Synchronous Delivery	2-7





# Agenda Item Summary

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**Prepared By:** Kashinda Sims

**Title:** Education Program Manager

**Date:** April 17, 2025

**Agenda Section:** L. Education

**Agenda Item Identification Number:** 2201438.02 AND 2202429.02

**Subject:** Appraisal Institute Request to Rescind Approval

**Description:** Appraisal Institute Activities Requested to be Rescinded by the education provider.

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## SUMMARY

EPM Sims reviewed the approved education listed on Appraisal Institute's website and requested whether the provider would maintain approval of a list of education activities not listed on Appraisal Institute's website [Exhibit 1]. Liz de Kanter of Appraisal Institute requested to rescind the continuing education activities, "Appraising Condominiums, CO-Ops, and PUDs," which was approved on August 31, 2020 through August 31, 2025 for seven hours of classroom continuing education (Activity #2201438.02), and "Using Spreadsheet Programs in Real Estate Appraisals - Synchronous," approved on May 26, 2020 through May 26, 2025 for seven hours of synchronous continuing education (Activity #2202429.02) as the material has been retired by the provider. Staff recommends the rescission of these activities.

## RELEVANT LAWS/RULES/GUIDANCE DOCUMENTS/INTERNAL PROCEDURES

298 NAC Chapter 6, § 003.04B(5) - The Board may rescind approval of a continuing education activity if the Board finds the materials, theories, and/or methodologies are not current and/or practical.

## DISCIPLINARY/WRITTEN ADVISORY HISTORY

There are no known previous disciplinary actions taken by the Board or written advisories issued by the Board.

## EXHIBITS

[Exhibit 1] - "Sims-de Kanter Email Chain (Request to Rescind)\_April 7, 2025" located in Education Interface in NRPAB Database (Education Interface Dropdown/ Select 'Search Education'/ Select 'Activity' in 'Search

By' dropdown/ Enter '2201438.02' or '2202429.02' for the respective activity/ Communication and Documentation Log dated 04/07/2025)

**From:** [Elizabeth de Kanter](#)  
**To:** [Sims, Kashinda](#)  
**Subject:** Re: List of Approved Appraisal Institute Education - Nebraska  
**Date:** Monday, April 7, 2025 5:59:39 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)  
[image005.png](#)  
[image006.png](#)  
[image008.png](#)  
[Outlook-A logo of .png](#)  
[Outlook-signature .png](#)  
[Outlook-signature .png](#)  
[Outlook-signature .png](#)  
[Outlook-signature .png](#)

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Hi Kashinda,

Yes that is correct! Thank you!

Have a great night!

Liz



**Liz de Kanter**  
Operations Assistant  
312-335-4191  
[appraisalinstitute.org](http://appraisalinstitute.org)

---

**From:** Sims, Kashinda  
**Sent:** Monday, April 7, 2025 5:14 PM  
**To:** Elizabeth de Kanter  
**Subject:** RE: List of Approved Appraisal Institute Education - Nebraska

Below is an updated request to rescind notice. You requested the activity, "Appraising Condominiums, Co-Ops, and PUDs" for the **classroom setting** to be rescinded. Thank you for your patience with the Board office.

Genuinely,  
Kashinda Sims  
Education Program Manager  
Nebraska Real Property Appraiser Board



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**From:** Sims, Kashinda  
**Sent:** Monday, April 7, 2025 4:23 PM  
**To:** Elizabeth de Kanter <[edekanter@appraisalinstitute.org](mailto:edekanter@appraisalinstitute.org)>  
**Subject:** RE: List of Approved Appraisal Institute Education - Nebraska

Kashinda Sims  
Education Program Manager  
Nebraska Real Property Appraiser Board



**From:** Elizabeth de Kanter <[edekanter@appraisalinstitute.org](mailto:edekanter@appraisalinstitute.org)>  
**Sent:** Monday, April 7, 2025 2:41 PM  
**To:** Sims, Kashinda <[Kashinda.Sims@nebraska.gov](mailto:Kashinda.Sims@nebraska.gov)>  
**Subject:** Re: List of Approved Appraisal Institute Education - Nebraska

Hi Kashinda,  
 Thank you!!!! Attached are the AQB's for the courses we want to keep as active as well as the last column.  
 Please let me know if you have any questions.

Sincerely,  
 Liz



**Liz de Kanter**  
 Operations Assistant  
 312-335-4191  
[appraisalinstitute.org](http://appraisalinstitute.org)

---

**From:** Sims, Kashinda  
**Sent:** Monday, April 7, 2025 1:46 PM  
**To:** Elizabeth de Kanter  
**Subject:** List of Approved Appraisal Institute Education - Nebraska

Good afternoon, Liz,

Attached is the list of Appraisal Institute education activities approved by the Nebraska Real Property Appraiser Board ("Board") as of April 1, 2025. Below is a list of education activities approved by the Board that are not listed on Appraisal Institute's website:

Advanced Income Capitalization	35	Qualifying Education	1211451.02	Classroom	11/29/2021		Keep Exp. 8/31/26
Advanced Income Capitalization	33	Qualifying Education	123340L.02	Synchronous	11/20/2023		Keep Exp. 8/31/26
Appraising Condominiums, Co-Ops, and PUDs	7	Continuing Education	2201438.02	Classroom	8/25/2020	8/31/2025	No longer provided for CL. Only Asynchronous.
Inconsistency: It's Hiding in Plain Sight in Your Appraisal	7	Continuing Education	2211436.02	Classroom	7/26/2021	7/26/2026	Keep Exp. 3/26/27

# Exhibit #1

Inconsistency: It's Hiding in Plain Sight in Your Residential Appraisal	7	Continuing Education	222140K.02	Classroom	10/17/2022	10/17/2027	Keep Exp. 9/9/25
Litigation Appraising: Specialized Topics and Applications [22.50]	23	Qualifying Education	1241460.02	Classroom	6/26/2024		Keep Exp. 6/12/25
Online Appraisal of Manufactured Homes and Next-Generation Manufactured Homes [7.5 Hours]	8	Continuing Education	2202444.02	Asynchronous	11/3/2020	11/6/2025	Keep Exp. 10/21/26 (IDECC)
Online Thinking Outside the Form	4	Continuing Education	2212402.02	Asynchronous	1/19/2021	1/20/2026	Keep Exp. 3/16/27 (AQB) Exp. 4/24/27 (IDECC)
Quantitative Analysis	35	Qualifying Education	1181404.02	Classroom	5/17/2018		Keep Exp. 1/25/27
Quantitative Analysis-Synchronous	35	Qualifying Education	1192471.02	Synchronous	7/26/2019		Keep Exp. 1/25/27
Residential Sales Comparison and Income Approaches	30	Qualifying Education	1243483.02	Synchronous	8/8/2024		Keep Exp. 9/14/27
Review Case Studies - Residential	15	Qualifying Education	123140W.02	Classroom	2/9/2024		Keep Classroom Exp. 8/21/27 <b>Need to apply for Synchronous. (Don't see it on the list of Active Courses) Correct?</b>
Synchronous Residential	15	Qualifying Education	1212444.02	Synchronous	10/15/2021		Keep

# Exhibit #1

Appraiser Site Valuation and Cost Approach							Exp. 4/15/27
Using Spreadsheet Programs in Real Estate Appraisals - Synchronous	7	Continuing Education	2202429.02	Synchronous	5/20/2020	5/26/2025	No longer provided for either CL or Sync.

The continuing education activity, "Litigation Appraising: Specialized Topics and Applications [22.50]," was requested to be rescinded by Appraisal Institute. See the attached Board action. The activity should appear as qualifying education.

Please confirm whether or not the Board should rescind approval of any of the above-referenced education activities at your earliest convenience.

Feel free to contact me if any further clarification is needed, thank you.

Genuinely,  
**Kashinda Sims**  
**Education Program Manager**  
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Bill Color Key	
<span style="color: blue;">■</span>	NRPAB High Priority Bills
<span style="color: red;">■</span>	Nebraska State Government Bills
<span style="color: green;">■</span>	General Interest Bills

109th Legislature (1st Regular Session) Bills of NRPAB Interest as of April 7, 2025	
Bill:	<a href="#">LB29</a>
Title:	Create a review process for agency rules and regulations
Status:	February 4, 2025 - Hearing before the Government, Military and Veterans Affairs Committee February 12, 2025
Summary:	LB29 amends the Administrative Procedure Act to, as of January 1, 2026, require that each state agency review all existing rules and regulations and every three years after. Each agency head shall designate a person responsible for this oversight. An electronic submission of detailed report with supportive documents shall be submitted to the Clerk of the Legislature on or before June 30th in year review is conducted. The review shall include whether or not rule and regulation is essential to health, safety or welfare of public; a costs vs benefits analysis; report that agency has process in place to measure effectiveness; report if a less restrictive rule and regulation has been considered; and report rule and regulation is a result of state statutory requirement, federal mandate, or court mandate. Upon receipt of agency reports, the Reference Committee of the Legislature shall reference each report to the standing committee based on jurisdictional oversight and the committee shall review and report to Clerk of Legislature by December 15th with recommendations for legislation or clarification. Agency and rulemaking and regulation shall be suspended during pendency of the review process unless rules and regulations impact the health, safety and welfare of the public, is time sensitive, or subject to state or federal regulation deadlines.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59121&amp;docnum=LB29&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59121&amp;docnum=LB29&amp;leg=109</a>
Notes:	Legislative Fiscal Office requested a Fiscal Note from the Nebraska Real Property Appraiser Board: A significant time burden would be placed on the Board’s staff to review each rule or regulation, including any pending rule or regulation, to determine if each rule or regulation is essential to the health, safety, or welfare of the public; to determine if the costs of each rule or regulation outweigh the benefits; to identify and report if the agency has a process in place to measure the effectiveness of each rule or regulation; to determine and identify if less restrictive alternative have been considered for each rule or regulation; and to identify and report if each rule or regulation was promulgated as the result of a state statutory requirement, federal mandate, or court decision. As the Board’s staff lacks the resources to conduct such review within its standard allocation of time, it is likely that the Board would have to contract with a third party to be responsible for such review. It is estimated that such review would require approximately 80 hours of work for the first report, and 20 hours of work for each report after. At an estimated contract rate of \$225.00 per hour for an individual qualified to conduct such review, the cost to the Board would be approximately \$18,000.00 for the first year, and \$4,500.00 for each report year after. Nebraska State Budget Division found no basis to disagree with the Nebraska Real Property Appraiser Board.

	No update since February 20, 2025 meeting.
Bill:	<a href="#">LB221</a>
Title:	Provide a procedure to fill unfilled gubernatorial appointments
Status:	February 3, 2025 - Hearing before the Executive Board March 13, 2025
Summary:	In the case of a gubernatorial appointment for a seat that has been vacant for six months or more, LB221 would authorize the legislative committee of jurisdiction to take applications for the seat and forward recommendations to the Governor for possible appointment. If the seat remains vacant for another three months after the date recommendations are forwarded to the Governor, the Executive Board of the Legislative Council may make the appointment.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59531&amp;docnum=LB221&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59531&amp;docnum=LB221&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.
Bill:	<a href="#">LB224</a>
Title:	Require paid maternity leave for state employees (Guereca Priority Bill)
Status:	March 25, 2025 - Placed on General File
Summary:	LB224 defines maternity leave and provides eligibility for qualified state employees.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59595&amp;docnum=LB224&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59595&amp;docnum=LB224&amp;leg=109</a>
Notes:	
Bill:	<a href="#">LB233</a>
Title:	Require coverage for in vitro fertilization for state employees under the Nebraska State Insurance Program
Status:	February 11, 2025 - Hearing before the Government, Military and Veterans Affairs Committee February 21, 2025
Summary:	Beginning July 1, 2025, the Nebraska State Insurance Program shall include coverage for in vitro fertilization. The special coverages permitted by this section shall be made available uniformly to all employees, but each employee shall retain the option to choose the special coverage or coverages which he or she desires or to reject all such special coverages. Coverage is limited to those individuals who have been unable to conceive or produce conception or sustain a successful pregnancy through less expensive and medically viable infertility treatment or procedures covered under the program, except that nothing in this subdivision shall be construed to deny the coverage required by this section to any individual who foregoes a particular infertility treatment or procedure if the individual's physician determines that such treatment or procedure is likely to be unsuccessful.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=58948&amp;docnum=LB233&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=58948&amp;docnum=LB233&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.



Bill:	<a href="#">LB261</a>
Title:	Appropriate funds for the expenses of Nebraska State Government for the biennium ending June 30, 2027, and appropriate Federal Funds allocated to the State of Nebraska pursuant to the federal American Rescue Plan Act of 2021
Status:	February 4, 2025 - Hearing before the Appropriations Committee February 18, 2025
Summary:	LB261 is the mainline appropriations and capital construction bill for the biennium that begins July 1, 2025, and ends on June 30, 2027. This measure includes budget recommendations for all State operations and aid programs. The bill includes the appropriate General Fund transfers as well as transfers between specified cash funds. The bill also includes the appropriate funds for reaffirmed and new construction projects. Reaffirmed projects include those projects currently underway that have already received approval and funding previously but were funded over several years. In addition to new and reaffirmed projects set forth in the bill, language is included that provides for the re-appropriation of unexpended June 30, 2024, appropriation balances for FY 2024-25 to continue or complete projects. Finally, it provides the necessary definitions for the proper administration of appropriations and personal service limitations.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59125&amp;docnum=LB261&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59125&amp;docnum=LB261&amp;leg=109</a>
Notes:	In LB261, the Board's appropriation is unchanged from this year, for the next two fiscal years. For FY2025-26, the Board's request for funding in the amount of \$20,590.00 for health insurance expenses is not included. In addition, the salary limit was increased by \$9,298.00 as recommended by the Governor for salary increases; however, no funds are included in the budget for this purpose.  No update since February 20, 2025 meeting.
Bill:	<a href="#">LB264</a>
Title:	Provide, change, and eliminate transfers from the Cash Reserve Fund and various other funds and change, terminate, and eliminate various statutory programs
Status:	February 4, 2025 - Hearing before the Appropriations Committee February 18, 2025
Summary:	LB264 provides for fund transfers, changes provisions governing the administration and the use of funds and repeals previous expansions to aid and incentive programs.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59130&amp;docnum=LB264&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59130&amp;docnum=LB264&amp;leg=109</a>
Notes:	LB264 includes a \$200,000.00 cash fund transfer out of the Real Property Appraiser Fund, a \$150,000.00 cash fund transfer out of the Appraisal Management Company Fund, and provides authority to the Legislature to make cash fund transfers out of the Appraisal Management Company Fund.  No update since February 20, 2025 meeting.

Bill:	<a href="#">LB295</a>
Title:	Change provisions relating to the County Employees Retirement Act, the Judges Retirement Act, the Nebraska State Patrol Retirement Act, the School Employees Retirement Act, the State Employees Retirement Act, the Spousal Pension Rights Act, and the Public Employees Retirement Board
Status:	March 25, 2025 - Placed on Select File
Summary:	<p>LB295 is a "clean-up" bill introduced at the request of the Nebraska Public Employees Retirement System (NPERS). The bill would amend various sections of statute governing state and county retirement plans administered by NPERS as well as statutes governing the Public Employees Retirement Board (PERB).</p> <p><a href="#">AM404</a> strikes original Section 18 and adds Section 5 to clarify the states contribution to the retirement system from the General Fund and makes non-substantial changes to correct language issues (adopted).</p> <p><a href="#">AM797</a> clarifies requirements for citizenship qualifications (filed).</p>
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59066&amp;docnum=LB295&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59066&amp;docnum=LB295&amp;leg=109</a>
Notes:	
Bill:	<a href="#">LB366</a>
Title:	Create the Legislative Economic Analysis Unit and the Chief Economist
Status:	February 3, 2025 - Hearing before the Executive Board February 12, 2025
Summary:	<p>LB366 amends §84-901 and §84-901.04 to establish the Legislative Economic Analysis Unit within the Legislature. The bill requires that any rule or regulation projected to have an economic impact of one million dollars or more over five years undergo a regulatory impact analysis before it can take effect. It also mandates that agencies submit cost-benefit analyses, job impact projections, and other relevant data for legislative review. Additionally, LB366 establishes a sixty-day waiting period for major rules unless approved by the Legislature and provides judicial review procedures for determining whether a rule qualifies as a major regulation. The Unit is responsible for providing a regulatory impact analysis of (1) any major rule or regulation or any proposed major rule or regulation; (2) existing rules and regulations; and (3) significant grants received from the federal government or sources outside state government when requested by the Speaker or committee of jurisdiction. LB366 provides certain requirements for the contents of the regulatory impact analysis and reporting of any analysis completed. The bill also provides requirements for information provided by any agency promulgating rules or regulations to the Unit for the purposes of completing the regulatory impact analysis. LB366 requires Legislative action to ratify a rule or regulation within 60 legislative days. The bill includes intent language to extend the legislative session or for the Governor to call a special session to approve proposed rules or regulations. If the Legislature is not in session, the Governor may approve a rule or regulation if a statement is included explaining why an emergency exists or why a federal requirement requires an earlier effective date; why the Legislature cannot be called into session to approve such rule or regulation; and why the rules or regulation complies with emergency powers or is required by federal law.</p>

Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59007&amp;docnum=LB366&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59007&amp;docnum=LB366&amp;leg=109</a>
Notes:	Section 2 of the bill provides for a baseline of 1%-2% contribution of each agency budget for incorporating the cost of the analysis.  No update since February 20, 2025 meeting.
Bill:	<a href="#">LB403</a>
Title:	Create the Office of Grants and provide duties
Status:	February 4, 2025 - Hearing before the Government, Military and Veterans Affairs Committee February 13, 2025
Summary:	LB403 establishes the Office of Grants within the executive branch to support the identification and coordination of federal and national grant opportunities for Nebraska state agencies, political subdivisions, and community-based organizations.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59524&amp;docnum=LB403&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59524&amp;docnum=LB403&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.
Bill:	<a href="#">LB433</a>
Title:	Exempt deputy directors and agency attorneys from the State Personnel System and change membership provisions under the State Employees Retirement Act
Status:	February 11, 2025 - Hearing before the Retirement Systems Committee February 21, 2025
Summary:	LB433 amends Neb. Rev. Stat. § 81-1316 to add deputy directors and attorneys among exclusions to the State Personnel System. Deputy Directors and Attorneys currently employed in these positions would have the option to remain in the State Personnel System or become exempt. LB433 also waives the 120-day wait for a permanent employee to be rehired to public service at the State of Nebraska as required by the State Employees Retirement System. N.R.S. § 84-1307 is amended to allow employees who were once permanently employed and contributing members of the state retirement system to return to re-employment with the state prior to waiting 120 days and resume participation in the retirement system upon rehire as a temporary employee.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=58983&amp;docnum=LB433&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=58983&amp;docnum=LB433&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.

Bill:	<a href="#">LB472</a>
Title:	Adopt the Regulatory Management Act
Status:	February 4, 2025 - Hearing before the Government, Military and Veterans Affairs Committee February 12, 2025
Summary:	LB472 establishes the Office of Regulatory Management within the Executive Branch. This Office aims to enhance and utilize transparency to reduce unnecessary regulatory burdens and ensure that new regulations are evidence-based and cost-effective. The office shall establish a baseline catalog of regulatory requirements currently in effect in all state agencies, boards or commissions. This catalog requires cooperation and communication from all state entities. Agencies shall complete an internal review of regulatory requirements. The review must contain the statutory authority or requirement and other relevant documentation related to the regulation. The initial review must be completed no later than 6 months after the effective date of the act. Subsequent reviews should be completed every 2 years or within 60 days of a request from the Office of Regulatory management. These reviews must contain estimates of monetized and nonmonetized costs or benefits if they are feasible. The office shall publish a biennial report showing the change in number and estimated impact of the regulatory requirement by agency, along with a cost estimate for the median citizen. The office must analyze each new regulatory requirement enacted by each agency to ensure best practices. These best practices are outlined within the act. It also outlines a process to follow when it is determined the regulation was not established using best practices.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59549&amp;docnum=LB472&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59549&amp;docnum=LB472&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.
Bill:	<a href="#">LB565</a>
Title:	Provide and change requirements relating to agency guidance documents
Status:	February 4, 2025 - Hearing before the Government, Military and Veterans Affairs Committee February 12, 2025
Summary:	LB565 creates new duties for agencies which promulgate rules and regulations under the Administrative Procedures Act (APA). LB565 would prohibit the issuance of new guidance documents on or after July 1, 2025 and before July 1, 2027, unless required under Federal rules. LB565 would restrict guidance documents from imposing greater regulations than federal requirements and would revoke guidance documents issued on or after July 1, 2022 and before July 1, 2025 pending a formal rulemaking process.  <a href="#">AM239</a> removes all state agencies from the bill except for the Department of Health and Human Services – Division of Developmental Disabilities (filed).
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59607&amp;docnum=LB565&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59607&amp;docnum=LB565&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.

Bill:	<a href="#">LB634</a>
Title:	Adopt the Legislative Sunset Review Act and eliminate the Legislature's Planning Committee (Executive Board Priority Bill)
Status:	February 3, 2025 - Hearing before the Executive Board March 6, 2025
Summary:	<p>LB485 creates the Legislative Sunset Review Committee for the purpose of reviewing reviewable entities and proposing legislation to eliminate or modify such reviewable entities. The Legislative Sunset Review Committee is comprised of the following members: (a) The chairperson of the Executive Board of the Legislative Council; (b) The chairperson of the Appropriations Committee of the Legislature; and (c) Five other members of the Legislature to be chosen by the Executive Board of the Legislative Council. The Legislative Sunset Review Committee shall create a schedule to perform sunset reviews of reviewable entities, with the initial sunset reviews beginning in 2027. Each reviewable entity shall be scheduled for review every five years. The performance measures for each program and activity provided by the reviewable entity and three years of data for each measure that provides actual results for the immediately preceding two years and projected results for the fiscal year that begins in the year that the reviewable entity report is scheduled to be submitted to the Legislature; (b) An explanation of factors that have contributed to any failure to achieve the legislative standards; (c) The promptness and effectiveness with which the reviewable entity disposes of complaints concerning persons affected by the entity; (d) The extent to which the reviewable entity has encouraged participation by the public in making its rules and decisions as opposed to participation solely by those it regulates and the extent to which public participation has resulted in rules compatible with the objectives of the reviewable entity; (e) The extent to which the reviewable entity has complied with applicable requirements of state law and applicable rules regarding purchasing goals and programs for small and minority-owned businesses; (f) A statement of any statutory objectives intended for each program and activity, the problem or need that the program and activity were intended to address, and the extent to which these objectives have been achieved; (g) An assessment of the extent to which the jurisdiction of the reviewable entity and its programs overlap or duplicate those of other reviewable entities and the extent to which the programs can be consolidated with those of other reviewable entities;</p> <p>(h) An assessment of less restrictive or alternative methods of providing services for which the reviewable entity is responsible which would reduce costs or improve performance while adequately protecting the public; (i) An assessment of the extent to which the reviewable entity has corrected deficiencies and implemented recommendations contained in reports of the Auditor of Public Accounts, legislative interim studies, and federal audit entities; (j) The process by which the reviewable entity actively measures quality and efficiency of services it provides to the public; (k) The extent to which the reviewable entity complies with public records requirements under sections 84-712 to 84-712.09 and the Open Meetings Act; (l) The extent to which alternative program delivery options, such as privatization, outsourcing, or insourcing, have been considered to reduce costs or improve services to residents of this state; (m) Recommendations to the Legislature for statutory, budgetary, or regulatory changes that would improve the quality and efficiency of services delivered to the public, reduce costs, or reduce duplication; (n) The effect of federal intervention or loss of federal funds if the reviewable entity is terminated; (o) A list of each advisory committee relating to the reviewable entity, including those established in statute and those established by managerial initiative, and for each advisory committee; (p) Programs or functions of the reviewable entity that are performed without specific statutory authority; and (q) Other information requested by the Legislature. Upon receipt of any report under section 5 of this act, the Legislative Sunset Review Committee may and the appropriate legislative committee shall conduct a review of the reviewable entity and its advisory committees, including an examination of the cost of each program of the</p>

	reviewable entity, an evaluation of best practices and alternatives that would result in the administration of the reviewable entity in a more efficient or effective manner, an examination of the viability of privatization or a different reviewable entity performing the functions, and an evaluation of the cost and consequences of discontinuing the reviewable entity. In its report on any reviewable entity, the Legislative Sunset Review Committee shall: (1) Make recommendations on the termination, continuation, or reorganization of each reviewable entity and its advisory committees and on the need for the performance of the functions of the reviewable entity and its advisory committees; (2) Make recommendations on the consolidation, transfer, or reorganization of programs within reviewable entities not under review when the programs duplicate functions performed in reviewable entities under review; and (3) Propose legislation in the next regular legislative session to carry out the recommendations of the Legislative Sunset Review Committee.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=58758&amp;docnum=LB634&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=58758&amp;docnum=LB634&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.
Bill:	<a href="#">LB664</a>
Title:	Change the Administrative Procedure Act to require agencies to allow for public comment and submissions on proposed rules and regulations and change permissible venue for civil actions challenging rules and regulations
Status:	February 4, 2025 - Hearing before the Government, Military and Veterans Affairs Committee February 12, 2025
Summary:	LB664 would change processes under the Administrative Procedure Act (APA) and proposes to allow for public comment and submissions relating to the proposal or adoption of rules or regulations as well as challenges to rules or regulations in locations outside of Lancaster County.
Legislature Information and Status:	<a href="https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59579&amp;docnum=LB664&amp;leg=109">https://nebraskalegislature.gov/bills/view_bill.php?DocumentID=59579&amp;docnum=LB664&amp;leg=109</a>
Notes:	No update since February 20, 2025 meeting.



# INTERNAL PROCEDURE 202501

Proposed April 17, 2025

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## **Written Advisory Letters**

A written advisory issued by a motion of the Board, at the request of a Real Property Appraiser Applicant Experience Review Subcommittee, or through an existing guidance document or internal procedural document, must explain the circumstances that result in the issuance of a written advisory; state the applicable laws, rules, guidance documents, internal procedural documents, USPAP rules and/or standard rules, and/or real property appraiser qualifications criteria; describe the expected outcome; and identify the repercussions for failure to meet the expected outcome. A written advisory will be separate from any other letter or document sent and will be sent by certified mail.



# INTERNAL PROCEDURE 201709

Amended July 15, 2021

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## Appraisal Review Services Contractor Fees

NRPA Subject Matter Expert (“SME”) Services Contractors and NRPA Applicant Appraisal Review Services (“AARS”) Contractors shall be compensated according to the following schedule (compensation may be prorated on a quarter-hour basis):

### AARS

Residential: 4 Hours x \$125.00 = \$500.00

2-4 Family: 5 Hours x \$125.00 = \$625.00

Agricultural: 7 Hours x \$125.00 = \$875.00

Commercial: 7 Hours X \$125.00 = \$875.00

### SME

Residential: 5 Hours x \$125.00 = \$625.00

2-4 Family: 5 Hours x \$125.00 = \$625.00

Agricultural: 12 Hours x \$125.00 = \$1500.00

Commercial: 12 Hours X \$125.00 = \$1500.00

In the case of extenuating circumstances, an unusually complex appraisal review assignment, or if the matter proceeds to hearing, the Board reserves the right to renegotiate the compensation rate and/or maximum amount, prior to the execution of, or agreed to in, the SME Services Agreement or the Credentialing Applicant Appraisal Review Services Agreement. If an SME contractor or AARS contractor determines that the compensation rate and/or maximum amount in the contract should be amended, such request, along for the reasons for making such request, must be made to the Board in writing. The Board will review the request and circumstances at its next regular meeting and make a determination to amend the contract or deny the request.

Compensation will only be paid if terms of contractual agreement are successfully completed in full. If the contractor’s performance is found to not be satisfactory in accordance with the Appraisal Review Services Contractor Program, the Board reserves the right to reduce the compensation, or not make payment due to breach of contract.





# THE NEBRASKA APPRAISER

News from the Nebraska Real Property Appraiser Board

Spring 2025

## Director's Comments



*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.*

Director Tyler Kohtz

## New Beginnings and Some Gratitude

The Board welcomes Adam Batie, who has been appointed by Governor Pillen as the Board's 3rd Congressional District Representative. Congratulations to Board Member Batie! The ASC compliance review of the Board's programs was completed in March of this year; the Appraiser Program and AMC Program, were awarded the ASC Finding of "Excellent." Thank you to all the past and present board members and staff for your hard work! A thank you is also in order for the Appraisal Subcommittee for the SARAS Grant award. More information regarding the SARAS Grant can be found under Quick Hits. I would like to acknowledge the effort of the Board's Business Programs Manager (BPM) for preparing the application and navigating the grant application process. Although the staff's heavy workload was the primary purpose for requesting approval for the BPM position from the Legislature, the financial justification was that this position would pay for itself; this has now been realized. Without the BPM position, the Board would not have the resources to apply for this Federal grant. Finally, the use of Federal funds also reduces the use of the Appraiser Fund and AMC Fund for these expenditures, which are funded by your fees. This is a win for appraisers, AMCs, and education providers. As always, the Board is here for you, so please feel free to contact me by phone or email with any questions or comments.

## In This Issue

### NRPAB Features:

- Changes to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act Approved by the Nebraska State Legislature (LB139)

### NRPAB Quick Hits:

- 2025 ASC Compliance Review Reports
- Legislation of NRPAB Interest
- Compliance Update (January - March 2025)
- Notice of ASC Grant Award (NGA) for Nebraska
- Guidance Documents Adopted/Retired Between January and March of 2025

### In the Spotlight:

- Adam Batie Appointed as Third Congressional District Certified Real Property Appraiser Representative on the Board

### Coming and Going:

- Who's New? (January - March 2025)
- Real Property Appraiser and AMC Numbers and Trends as of April 1, 2025
- Real Property Appraiser Credential Renewal Report as of April 2025

### Financial Snapshot:

- March 31, 2025 Financial Report

### Upcoming NRPAB Meetings:

- ◆ May 15, 2025 @ NRPAB Office (Conference Room)
- ◆ June 18, 2025 @ NRPAB Office (Conference Room)
- ◆ July 17, 2025 @ NRPAB Office (Conference Room)

These meeting dates are all tentative. Please check the Board's Facebook page or website for information as these dates approach. The start time for each meeting can be found in the public notice and on the agenda posted to the Board's website at least 48 hours prior to the start of the meeting. Any meeting also held by virtual conferencing will be stated as such in the public notice for that meeting.

# Changes to the Nebraska Real Property Appraiser Act and Appraisal Management Company Registration Act Approved by the Nebraska State Legislature (LB139)

By Tyler Kohtz, Director

LB139 was introduced by Senator Dungan at the request of the Nebraska Real Property Appraiser Board on January 13, 2025. The intent of the Board's regulatory program is to be educational in practice when possible. LB139 updates the Nebraska Real Property Appraiser Act, and the Appraisal Management Company Registration Act, to implement the use of a contingent dismissal in lieu of disciplinary action. For violations that do not rise to the level of filing a formal complaint, and when a dismissal with a written advisory opinion does not provide adequate oversight to ensure that the issues leading to violations are corrected, the Board has no remedy to cure minor unintentional violations without a real property appraiser or AMC suffering the ramifications of discipline on their record, including but not limited to, reporting the disciplinary action to the Appraisal Subcommittee to be included on the Appraiser Registry or the AMC Registry. LB139 was passed by the Nebraska Legislature on March 6, 2025 and signed by Governor Pillen on March 11, 2025.

## **LB139 includes the following changes to the Nebraska Real Property Appraiser Act:**

*“Upon receipt of information indicating that a person may have violated any provision of the Real Property Appraiser Act, the board shall make an investigation of the facts to determine whether or not there is evidence of a violation. If technical assistance is required, the board may contract with or use qualified persons.”* is stricken from added subdivision “c” in Neb. Rev. Stat. § 76- 2239(1) and reinserted in added subdivision “a” for clarification;

*“or, at the board's discretion, enter into a contingent dismissal agreement with remedial measures with a credential holder”* is added after *“cease and desist order”* in added subdivision “b” in Neb. Rev. Stat. § 76-2239(1) to provide authority to the Board to enter into a contingent dismissal with a real property appraiser for violations of the Act. This language pertains to actions that the Board may take against a real property appraiser for violations of the Act;

*“for such technical assistance”* is added after *“qualified persons”* in Neb. Rev. Stat. § 76- 2239(1)(c) for clarification;

*“A successfully completed contingent dismissal agreement is not disciplinary action”* is added to Neb. Rev. Stat. § 76-2239(1)(c) to clarify that the successful completion of a contingent dismissal agreement by a real property appraiser is not considered to be disciplinary action reported to the Appraisal Subcommittee; and

*“or enter into contingent dismissal agreements”* is added after *“negotiate settlements”* in Neb. Rev. Stat. § 76-2239(2)(a) to provide the Board authority to offer a contingent dismissal agreement when an investigation indicates that a person may have violated a provision of the Act. This language pertains to when a contingent dismissal agreement may be offered.

## **LB139 includes the following changes to the Appraisal Management Company Registration Act:**

*“a person applying for issuance of a registration or renewal of a registration”* is stricken and *“An appraisal management company”* is added in Neb. Rev. Stat. § 76-3207(1) to clarify that ownership requirements apply to owners of an AMC, not applicants only at the time of application;

*“or, enter into a contingent dismissal agreement with remedial measures with an appraisal management company”* is added in Neb. Rev. Stat. § 76-3216(4) to provide authority to the Board to enter into a contingent dismissal with an AMC for violations of the Act; and

*“A successfully completed contingent dismissal agreement is not disciplinary action”* is added in Neb. Rev. Stat. § 76-3216(6) to clarify that the successful completion of a contingent dismissal agreement by an appraisal management company is not considered to be disciplinary action reported to the Appraisal Subcommittee.

More details regarding the specifics of these changes can be provided upon request. If you have questions regarding LB139, please contact me by email at [tyler.kohtz@nebraska.gov](mailto:tyler.kohtz@nebraska.gov), or by phone at 402-471-9015.

## NRPAB Quick Hits

- ◆ Pursuant to Title XI of the Financial Institutions Reform, Recovery, and Enforcement Act of 1989 (Title XI), the Appraisal Subcommittee (ASC) of the Federal Financial Institutions Examination Council monitors each State's appraiser licensing and certification regulatory program to ensure the State: (1) Recognizes and enforces the standards, requirements, and procedures prescribed by Title XI; (2) Has adequate authority to permit it to carry out its Title XI related functions; and (3) Makes decisions concerning appraisal standards, appraiser qualifications and supervision of appraiser practices consistent with Title XI. The ASC performed an on-site Compliance Review of the State of Nebraska Appraiser Regulatory Program and AMC Regulatory Program in March of 2025; both of the State's programs received an ASC Finding of Excellent. The 2025 ASC Compliance Review Reports can be found on the Board's website at: [https://appraiser.ne.gov/Appraisal\\_Subcommittee\\_Reports/index.html](https://appraiser.ne.gov/Appraisal_Subcommittee_Reports/index.html).
- ◆ Each legislative session, the Board follows legislative bills introduced by the Nebraska State Legislature that may have an impact on the real property appraiser profession or agency operations. A summary of these bills, along with the link to the legislative information, can be found on the main page of the Board's website at: [appraiser.ne.gov](http://appraiser.ne.gov). Select the hyperlink titled "2025 Nebraska Legislation of NRPAB Interest" in the blue box on the right-hand side of the page. If you have any comments regarding any of the bills listed in this document, please feel free to contact the Board's office at 402-471-9015, or email Director Kohtz at [tyler.kohtz@nebraska.gov](mailto:tyler.kohtz@nebraska.gov).

- ◆ Compliance Update

- \* Between the months of January and March, a grievance was filed against one Nebraska credentialed real property appraiser. During this time, disciplinary action was taken by the Board against one appraiser, one grievance was dismissed with prejudice, and one grievance was closed.



- \* Between the months of January and March, a grievance was filed against three appraisal management companies. During this time, disciplinary action was taken against one appraisal management company.



## Board Members

### *Chairperson of the Board*

**Cody Gerdes**, Lincoln  
Certified General Appraiser  
1<sup>st</sup> District Representative  
Term Expires: January 1, 2026

### *Vice-Chairperson of the Board*

**Kevin P. Hermsen**, Gretna  
Certified General Appraiser  
2<sup>nd</sup> District Representative  
Term Expires: January 1, 2027

### *Board Member*

**Rodney Johnson**, Norfolk  
Certified General Appraiser  
Licensed Real Estate Broker Rep  
Term Expires: January 1, 2028

### *Board Member*

**Derek Minshull**, North Platte  
Financial Institutions Rep  
Term Expires: January 1, 2029

### *Board Member*

**Adam Batie**, Kearney  
Certified General Appraiser  
3rd District Representative  
Term Expires: January 1, 2030



## NRPAB Quick Hits

- ◆ To support the efforts of eligible state agencies to comply with Title XI, the Appraisal Subcommittee (ASC) of the Federal Financial Institutions Examination Council makes awards through State Appraiser Regulatory Agencies Support (SARAS) Grants, in support of:

(1) the complaint process, complaint investigations, and appraiser enforcement activities of such agencies.

(2) the submission of data on State licensed and certified appraisers and State registered AMCs to the National Registries.

The ASC also makes grant awards that improve the State regulatory processes and advance the appraisal industry through grants that support high-quality, impact-oriented programming by State agencies identified in their proposals.

On September 3, 2024, the Board submitted its first ever application to the ASC for a SARAS Grant through the end of Fiscal Year 2026-27, for the director's attendance of, and travel to and from, AARO Conferences; and for the development and implementation of multiple technology projects. On February 25, 2025, the Board received a Notice of Grant Award in the amount of \$58,033.00 for Fiscal Year 2024-25. The SARAS Grant award includes an approved budget for the director's attendance of, and travel to and from, the 2024 Fall AARO Conference; attendance of the 2025 Spring AARO Conference; and to migrate temporary real property appraiser applications online. In its application, the Board requested funding in the amount of \$120,000.00 for each of the next two fiscal years.

- ◆ The Nebraska Real Property Appraiser Board retired no guidance documents, and adopted no new guidance documents, between January and March. All Guidance Documents are available for viewing on the Board's website at: [https://appraiser.ne.gov/guidance\\_documents.html](https://appraiser.ne.gov/guidance_documents.html).

## NRPAB Staff

### Tyler Kohtz

Executive Director

402-471-9015

[tyler.kohtz@nebraska.gov](mailto:tyler.kohtz@nebraska.gov)

### Kashinda Sims

Education Program Manager

402-471-9022

[kashinda.sims@nebraska.gov](mailto:kashinda.sims@nebraska.gov)

### Karen Loll

Licensing Programs Manager

402-471-9024

[karen.loll@nebraska.gov](mailto:karen.loll@nebraska.gov)

### Colby Falls

Business Programs Manager

402-471-9015

[colby.falls@nebraska.gov](mailto:colby.falls@nebraska.gov)

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

Phone: 402-471-9015

Fax: 402-471-9017

Website: [appraiser.ne.gov](http://appraiser.ne.gov)



[Visit NRPAB on Facebook](#)



What's new at  
The Appraisal Foundation?  
[appraisalfoundation.org](http://appraisalfoundation.org)



What's new at the  
Appraisal Subcommittee?  
[asc.gov](http://asc.gov)



What's new at the AARO?  
[aaro.net](http://aaro.net)

## In the Spotlight: Adam Batie Appointed as Third Congressional District Certified Real Property Appraiser Representative on the Board

Governor Jim Pillen appointed Nebraska Certified General Real Property Appraiser Adam Batie to the Nebraska Real Property Appraiser Board as the Third Congressional District Certified Real Property Appraiser Representative on March 11, 2025. Newly appointed Board Member Batie was sworn in by Chief Deputy Secretary of State Colleen Byelick on April 17, 2025.

Batie graduated from Kearney High School, and earned a Bachelor of Science Degree in Psychology from the University of Nebraska. Batie has been employed with United Farm and Ranch Management for the past thirteen years with a real property appraisal practice focus on the appraisal of agricultural property. Batie also holds the Accredited Rural Appraiser (ARA) designation through the American Society of Farm Managers and Rural Appraisers.

In his free time, Batie enjoys landscaping and attending his children's sporting events. Batie's term on the Board will run through December 31, 2029.

If you would like to offer your congratulations to Adam Batie, please email Director Kohtz at [tyler.kohtz@nebraska.gov](mailto:tyler.kohtz@nebraska.gov) with your comments.

*"I look forward to contributing to the appraisal industry by serving on the Board."*

– Adam Batie

## 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 January and March of 2025.

### *Trainee Real Property Appraisers*

**Hartung, Jacob**, Lincoln, NE – T2025001  
**Biesecker, Reagan**, Wellen, NE – T2025002  
**Freking, Camden**, Omaha, NE – T2025003  
**Weber, Joshua**, Lincoln, NE – T2025004

### *Certified Residential Real Property Appraisers*

**Ruffcorn, Blake**, Bennington, NE – CR2025001R  
**Green, John**, Brookings, SD – CR2025002R  
**Kohel, Laura**, Ashland, NE – CR2025003  
**Korver, Ann**, Orange City, IA – CR2025004R  
**Nelson, Linda**, Concord, NC – CR2025005R

### *Certified General Real Property Appraisers*

**Myers, Christopher**, Pasadena, CA – CG2025001R  
**Sudbeck, Cael**, Orlando, FL – CG2025002R  
**Fitterer, Tyler** Broken Bow, NE – CG2025003R  
**Green, John**, Brookings, SD – CG2025004R  
**Irland, Andrew**, Centennial, CO – CG2025005R  
**Lekberg, Erik**, Oak Brook, IL – CG2025006R  
**Clough, Rodney**, Loveland, CO – CG2025007R

### *Appraisal Management Companies*

**R3 Appraisal Management, LLC**,  
Henderson, NV—CG2025001

## *Have questions? We have answers!*

Questions related to appraisal management company registration and renewal: [nrpab.amc@nebraska.gov](mailto:nrpab.amc@nebraska.gov)

Questions related to AMC Login: [nrpab.amclogin@nebraska.gov](mailto:nrpab.amclogin@nebraska.gov)

Questions related to real property appraiser credentialing: [nrpab.credentialing@nebraska.gov](mailto:nrpab.credentialing@nebraska.gov)

Questions related to real property appraiser credential renewal: [nrpab.renewals@nebraska.gov](mailto:nrpab.renewals@nebraska.gov)

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

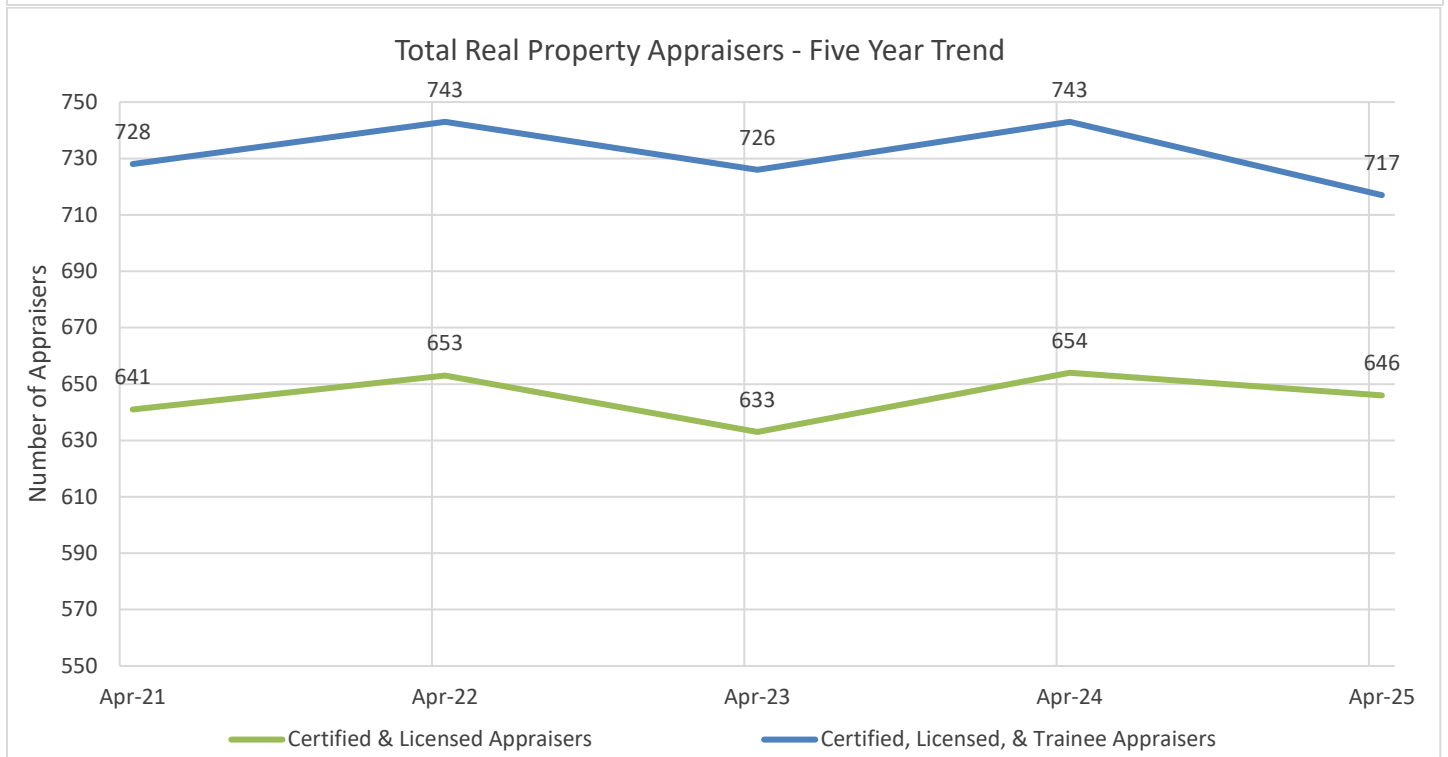
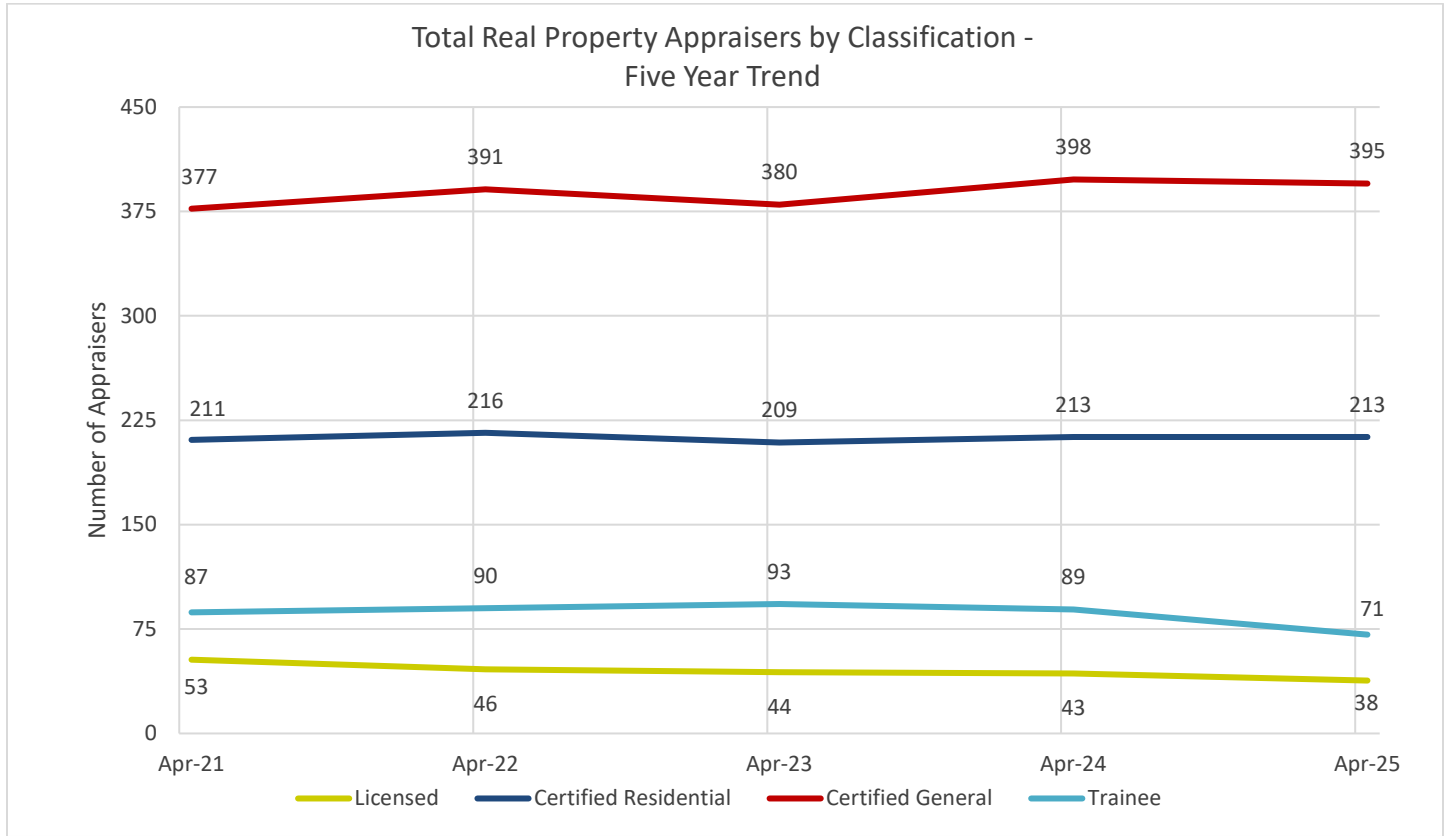
Questions related to investigations, or how to file a grievance: [nrpab.compliance@nebraska.gov](mailto:nrpab.compliance@nebraska.gov)

Questions related to Appraiser Login: [nrpab.AppraiserLogin@nebraska.gov](mailto:nrpab.AppraiserLogin@nebraska.gov)

General Questions: [nrpab.questions@nebraska.gov](mailto:nrpab.questions@nebraska.gov)

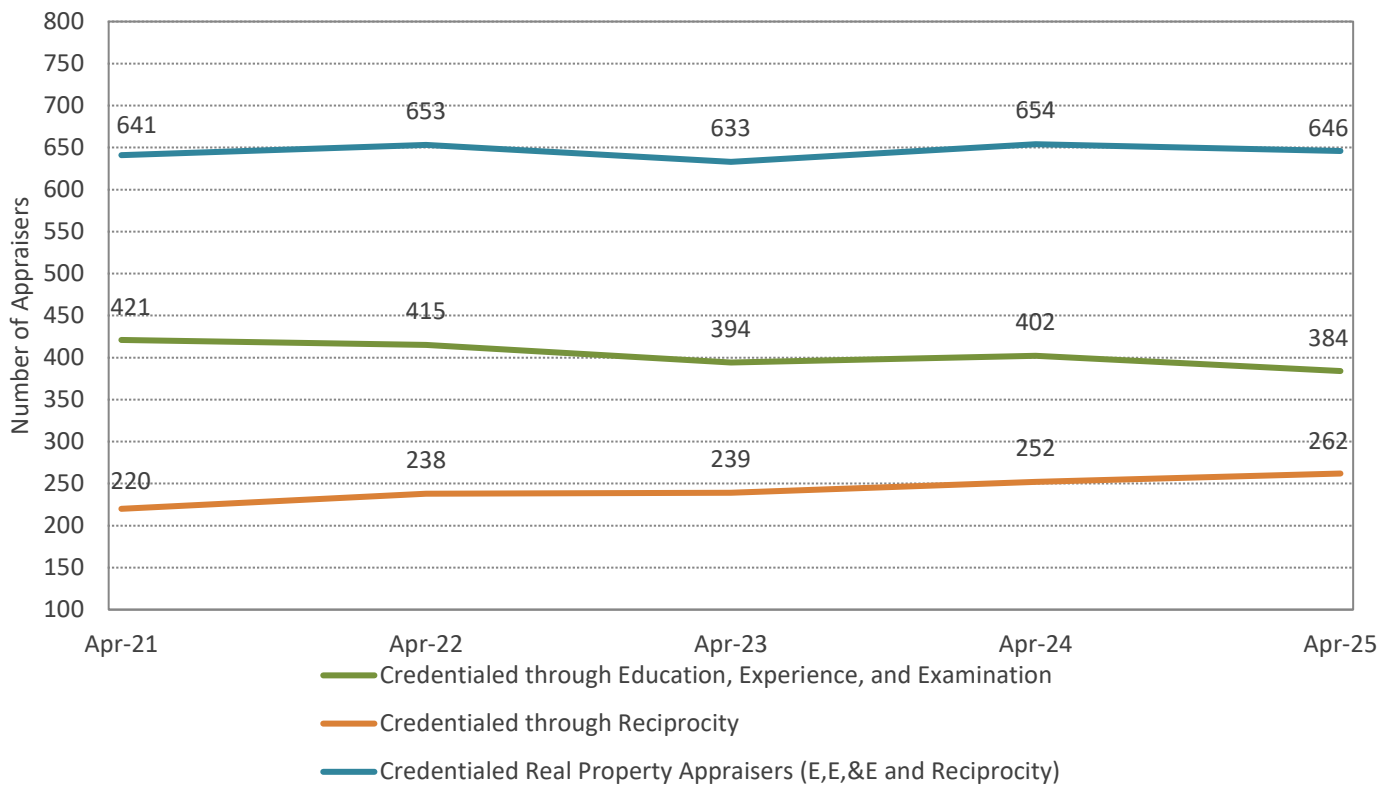
## Real Property Appraiser and AMC Numbers and Trends as of April 1, 2025

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 April 1, 2025. There are currently 646 licensed residential, certified residential, and certified general real property appraisers in Nebraska, and 71 credentialed trainee real property appraisers. In addition, there are currently 71 appraisal management companies registered in Nebraska.

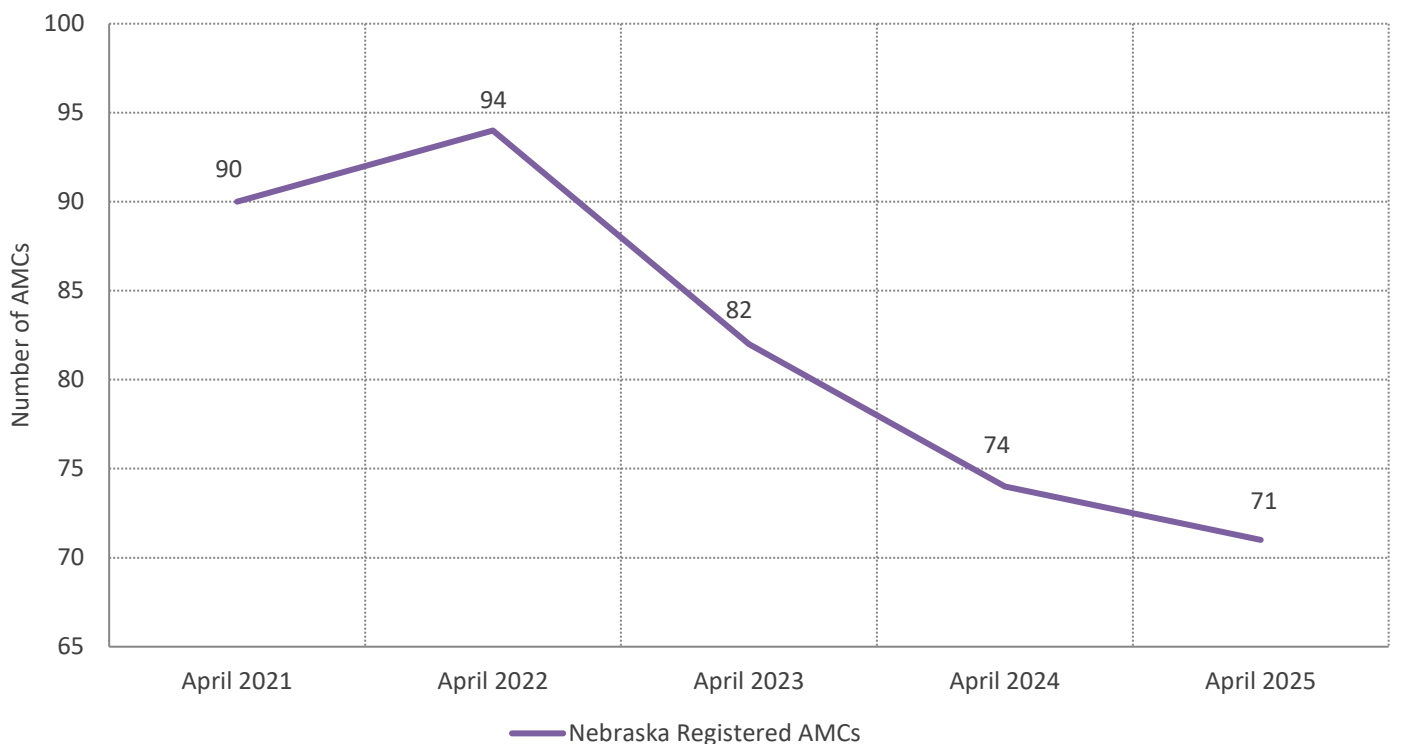


## Real Property Appraiser and AMC Numbers and Trends as of April 1, 2025 (Continued)

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

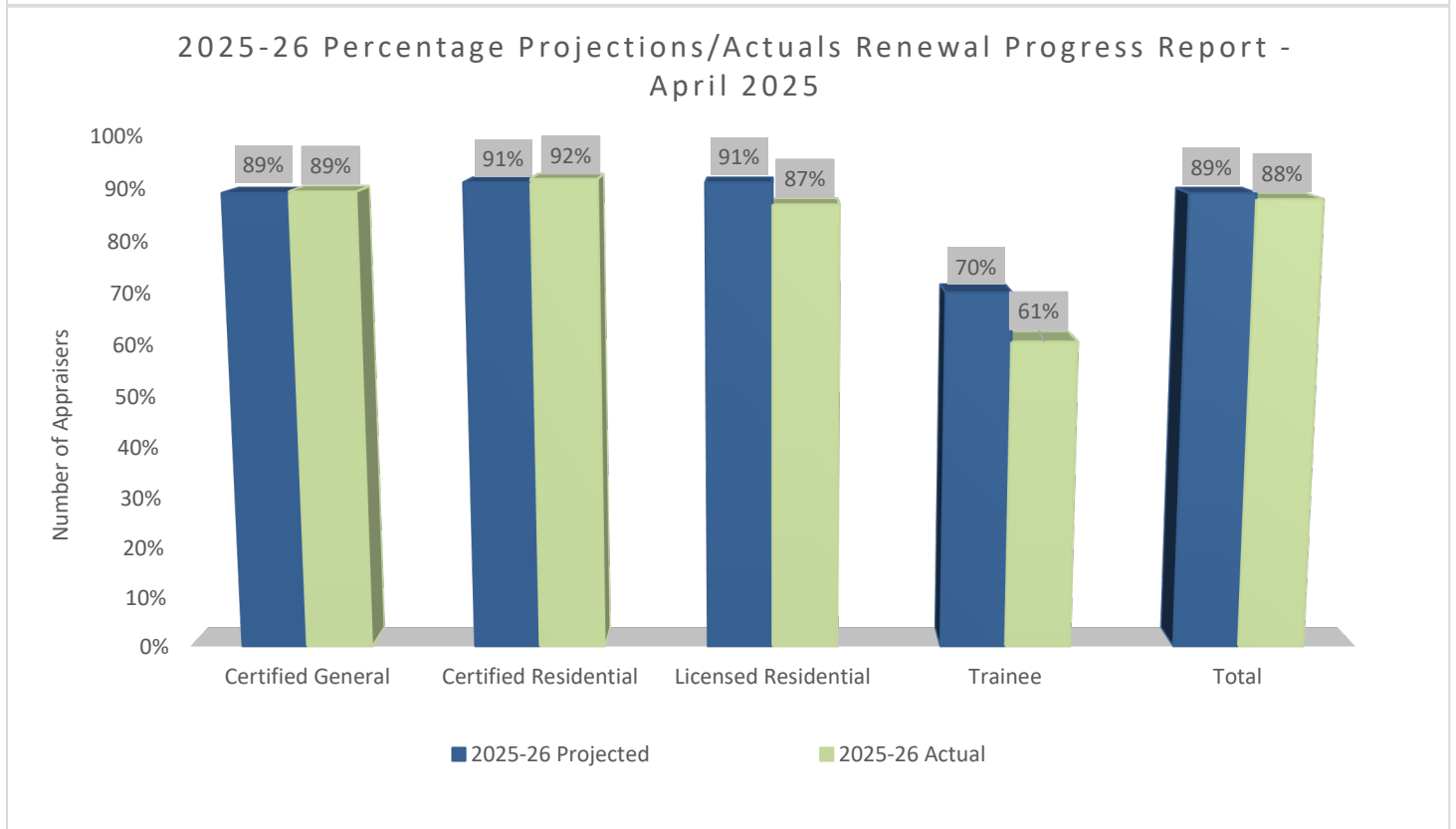
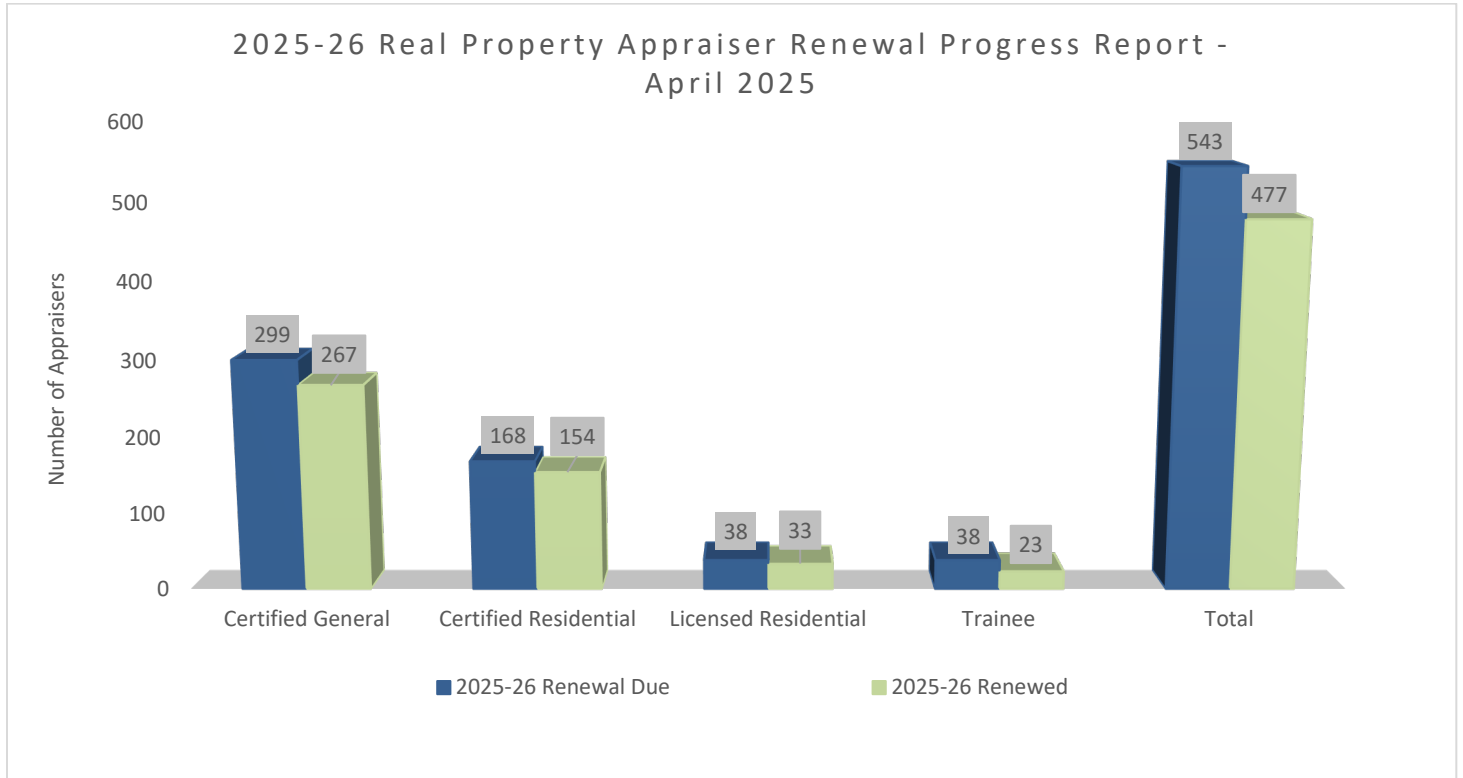


### Appraisal Management Companies - Five Year Trend



## Real Property Appraiser Renewal Counts and Percentages as of April 2025

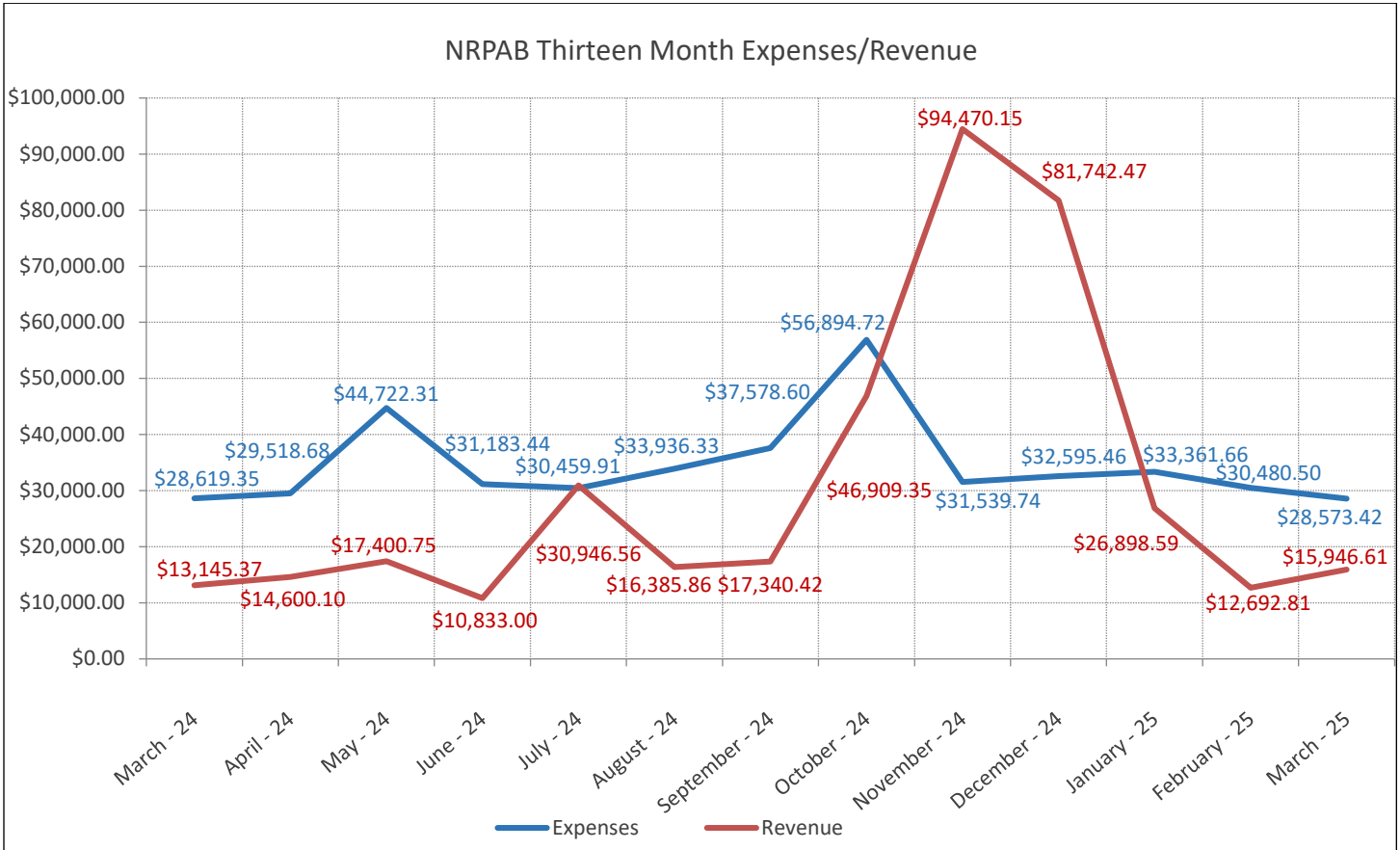
The charts below outline the real property appraiser renewal counts and percentages as of January 2025. There were 543 trainee, licensed residential, certified residential, and certified general real property appraiser renewals due, and 477 credentials were renewed.





# NRPAB Financial Snapshot as of March 31, 2025

For the Real Property Appraiser Program, which includes both the appraiser fund and the AMC fund, a total of \$315,420.34 in expenditures and \$343,332.82 in revenues were recorded as of March 31, 2025. Actual expenses registered at 61.05 percent of the budgeted expenditures for the fiscal year; 75.07 percent of the fiscal year has passed.



← ↻ 🔍 <https://appraiser.ne.gov>

**Official Nebraska Government Website**

## Nebraska Real Property Appraiser Board

[Home](#) | 
 [Board Members and Staff](#) | 
 [Contact](#) | 
 [Appraiser Login](#) | 
 [AMC Login](#) | 
 [NRPAB Approved Education](#) | 
 [Nebraska Credentialed Real Property Appraisers](#) | 
 [Supervisory Appraiser Contact List](#) | 
 [Nebraska Registered AMCs](#)

**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 2024-25 Renewal Period:

[2024-25 Real Property Appraiser Continuing Education Requirements \(pdf\)](#)

[2024-25 Renewal Questions & Answers \(pdf\)](#)

**AMC Registration**

[Appraiser Credentialing](#)

[Board Meetings](#)

[Education](#)

[Enforcement](#)

[Laws, Rules, and Regulations, and Guidance Documents](#)

[Public Information](#)

[Realtor Firms](#)

[USPAP Review Report Forms](#)

[2024 Nebraska Legislation of NRPAB Interest](#)

[2024-25 Renewal Applications](#)

**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.**

March 24, 2025

**Via Email**

Tyler Kohtz, Director  
Nebraska Real Property Appraiser Board  
P.O. Box 94963  
Lincoln, NE 68509-4963  
[Tyler.Kohtz@nebraska.gov](mailto:Tyler.Kohtz@nebraska.gov)

RE: ASC Compliance Review of Nebraska's Appraiser Regulatory Program

Dear Tyler Kohtz:

The Appraisal Subcommittee (ASC) staff conducted an ASC Compliance Review (Review) of the Nebraska appraiser regulatory program (Appraiser Program) on March 11-13, 2025, to determine the Program's compliance with Title XI of the Financial Institutions Reform, Recovery, and Enforcement Act of 1989.

The ASC considered the preliminary results of the Review and the State's response to those results. The Appraiser Program has been awarded an ASC Finding of "Excellent." Nebraska will remain on a two-year Review Cycle. The final ASC Compliance Review Report (Report) of the Nebraska Appraiser Program is attached.

This letter and the attached Report are public records and available on the ASC website. Please contact us if you have any questions about this Report.

Sincerely,



Matt Ponzar  
Acting Executive Director

Attachment

## ASC Finding Descriptions

ASC Finding	Rating Criteria	Review Cycle*
Excellent	<ul style="list-style-type: none"> <li>• State meets all Title XI mandates and complies with requirements of ASC Policy Statements</li> <li>• State maintains a strong regulatory Program</li> <li>• Very low risk of Program failure</li> </ul>	2-year
Good	<ul style="list-style-type: none"> <li>• State meets the majority of Title XI mandates and complies with the majority of ASC Policy Statement requirements</li> <li>• Deficiencies are minor in nature</li> <li>• State is adequately addressing deficiencies identified and correcting them in the normal course of business</li> <li>• State maintains an effective regulatory Program</li> <li>• Low risk of Program failure</li> </ul>	2-year
Needs Improvement	<ul style="list-style-type: none"> <li>• State does not meet all Title XI mandates and does not comply with all requirements of ASC Policy Statements</li> <li>• Deficiencies are material but manageable and if not corrected in a timely manner pose a potential risk to the Program</li> <li>• State may have a history of repeated deficiencies but is showing progress toward correcting deficiencies</li> <li>• State regulatory Program needs improvement</li> <li>• Moderate risk of Program failure</li> </ul>	2-year with additional monitoring
Not Satisfactory	<ul style="list-style-type: none"> <li>• State does not meet all Title XI mandates and does not comply with all requirements of ASC Policy Statements</li> <li>• Deficiencies present a significant risk and if not corrected in a timely manner pose a well-defined risk to the Program</li> <li>• State may have a history of repeated deficiencies and requires more supervision to ensure corrective actions are progressing</li> <li>• State regulatory Program has substantial deficiencies</li> <li>• Substantial risk of Program failure</li> </ul>	1-year
Poor**	<ul style="list-style-type: none"> <li>• State does not meet Title XI mandates and does not comply with requirements of ASC Policy Statements</li> <li>• Deficiencies are significant and severe, require immediate attention and if not corrected represent critical flaws in the Program</li> <li>• State may have a history of repeated deficiencies and may show a lack of willingness or ability to correct deficiencies</li> <li>• High risk of Program failure</li> </ul>	Continuous monitoring

\*Program history or nature of deficiency may warrant a more accelerated Review Cycle.

\*\*An ASC Finding of “Poor” may result in significant consequences to the State. See Policy Statement 5, Reciprocity; see also Policy Statement 12, Interim Sanctions.



## ASC State Appraiser Program Compliance Review Report

ASC Finding: Excellent

Final Report Issue Date: March 24, 2025

<b>Nebraska Appraiser Regulatory Program (State)</b>			
Nebraska Real Property Appraiser Board	PM: J. Stewart	ASC Compliance Review Date: March 11-13, 2025	Review Period: March 2023 to February 2025
Umbrella Agency: Independent		Number of State Credentialed Appraisers on Appraiser Registry: 636	Review Cycle: Two Year

Applicable Federal Citations	Compliance (YES/NO) Areas of Concern (AC)			ASC Staff Observations	State Response	Required/Recommended State Actions	General Comments
	YES	NO	AC				
<b>Statutes, Regulations, Policies and Procedures:</b>	X			No compliance issues noted.	N/A	None	None
<b>Temporary Practice:</b>	X			No compliance issues noted.	N/A	None	None
<b>National Registry:</b>	X			No compliance issues noted.	N/A	None	None
<b>Application Process:</b>	X			No compliance issues noted.	N/A	None	None
<b>Reciprocity:</b>	X			No compliance issues noted.	N/A	None	None
<b>Education:</b>	X			No compliance issues noted.	N/A	None	None
<b>Enforcement:</b>	X			No compliance issues noted.	N/A	None	None

March 24, 2025

**Via Email**

Tyler Kohtz, Director  
Nebraska Real Property Appraiser Board  
P.O. Box 94963  
Lincoln, NE 68509-4963  
[Tyler.Kohtz@nebraska.gov](mailto:Tyler.Kohtz@nebraska.gov)

RE: ASC Compliance Review of Nebraska's Appraisal Management Company (AMC)  
Regulatory Program

Dear Tyler Kohtz:

The Appraisal Subcommittee (ASC) staff conducted an ASC Compliance Review (Review) of the Nebraska AMC regulatory program (AMC Program) on March 11-13, 2025, to determine the Program's compliance with Title XI of the Financial Institutions Reform, Recovery, and Enforcement Act of 1989, as amended.<sup>1</sup>

The ASC considered the preliminary results of the Review and the State's response to those results. The AMC Program has been awarded an ASC Finding of "Excellent." Nebraska will remain on a two-year Review Cycle. The final ASC Compliance Review Report (Report) of the Nebraska AMC Program is attached.

This letter and the attached Report are public records and available on the ASC website. Please contact us if you have any questions about this Report.

Sincerely,



Matt Ponzar  
Acting Executive Director

Attachment

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<sup>1</sup> 12 U.S.C. §§ 3331-3356

## ASC Finding Descriptions

ASC Finding	Rating Criteria	Review Cycle*
Excellent	<ul style="list-style-type: none"> <li>• State meets all Title XI mandates and complies with requirements of ASC Policy Statements</li> <li>• State maintains a strong regulatory Program</li> <li>• Very low risk of Program failure</li> </ul>	2-year
Good	<ul style="list-style-type: none"> <li>• State meets the majority of Title XI mandates and complies with the majority of ASC Policy Statement requirements</li> <li>• Deficiencies are minor in nature</li> <li>• State is adequately addressing deficiencies identified and correcting them in the normal course of business</li> <li>• State maintains an effective regulatory Program</li> <li>• Low risk of Program failure</li> </ul>	2-year
Needs Improvement	<ul style="list-style-type: none"> <li>• State does not meet all Title XI mandates and does not comply with all requirements of ASC Policy Statements</li> <li>• Deficiencies are material but manageable and if not corrected in a timely manner pose a potential risk to the Program</li> <li>• State may have a history of repeated deficiencies but is showing progress toward correcting deficiencies</li> <li>• State regulatory Program needs improvement</li> <li>• Moderate risk of Program failure</li> </ul>	2-year with additional monitoring
Not Satisfactory	<ul style="list-style-type: none"> <li>• State does not meet all Title XI mandates and does not comply with all requirements of ASC Policy Statements</li> <li>• Deficiencies present a significant risk and if not corrected in a timely manner pose a well-defined risk to the Program</li> <li>• State may have a history of repeated deficiencies and requires more supervision to ensure corrective actions are progressing</li> <li>• State regulatory Program has substantial deficiencies</li> <li>• Substantial risk of Program failure</li> </ul>	1-year
Poor**	<ul style="list-style-type: none"> <li>• State does not meet Title XI mandates and does not comply with requirements of ASC Policy Statements</li> <li>• Deficiencies are significant and severe, require immediate attention and if not corrected represent critical flaws in the Program</li> <li>• State may have a history of repeated deficiencies and may show a lack of willingness or ability to correct deficiencies</li> <li>• High risk of Program failure</li> </ul>	Continuous monitoring

\*Program history or nature of deficiency may warrant a more accelerated Review Cycle.

\*\*An ASC Finding of “Poor” may result in significant consequences to the State. See Policy Statement 5, Reciprocity; see also Policy Statement 12, Interim Sanctions.



## ASC State AMC Program Compliance Review Report

ASC Finding: Excellent

Final Report Issue Date: March 24, 2025

<b>Nebraska AMC Regulatory Program (State)</b>			
Nebraska Real Property Appraiser Board	PM: J. Stewart	ASC Compliance Review Date: March 11-13, 2025	Review Period: March 2023 to February 2025
Umbrella Agency: Independent		Number of AMCs on AMC Registry: 72	Review Cycle: Two Year

Applicable Federal Citations	Compliance (YES/NO) Areas of Concern (AC)			ASC Staff Observations	State Response	Required/Recommended State Actions	General Comments
	YES	NO	AC				
<b>Statutes, Regulations, Policies and Procedures:</b>	X						
				No compliance issues noted.	N/A	None	None
<b>National Registry:</b>	X						
				No compliance issues noted.	N/A	None	None
<b>Enforcement:</b>	X						
				No compliance issues noted.	N/A	None	None

**From:** The Appraisal Foundation <news@appraisalfoundation.org>  
**Sent:** Tuesday, April 1, 2025 8:11 AM  
**To:** Kohtz, Tyler  
**Subject:** APRIL NEWSLETTER: New concept papers



Greetings!

Spring has sprung and, with it, the release of two new concept papers! This is one of those rare times that both the Appraiser Qualifications Board and Appraisal Standards Board have concept papers available for public comment at the same time, and I hope you will take advantage of this opportunity to have your voice heard in the development of standards and qualifications.

First up, the Appraiser Qualifications Board [released their concept paper](#) on additional experience options last month. This is a continuation of their work to conduct a comprehensive review of all qualification criteria. The [comment deadline for this paper is May 9th](#), and you can join the upcoming AQB public meeting on April 10th to learn more.

You'll recall that the concept paper released late last year addressed college course and degree-related requirements. This new paper continues that work by exploring additional experience options. While work on exam-related requirements is still underway, the AQB's goal is to issue an exposure draft addressing these topics as soon as possible—ideally by the end of the year, though that timeline may shift depending on the scope of the remaining work.

Turning to the Appraisal Standards Board, today is the [release day for their new concept paper](#) focusing on artificial intelligence. This follows last fall's artificial intelligence forum and is a continued exploration of the potential impacts artificial intelligence might have on appraisers and the appraisal standards. The [public comment deadline for this concept paper is May 31st](#).

To access both concept papers and all of the information needed to comment, be sure to head over to our [Exposure Drafts](#) webpage or use the links provided above.

### In This Newsletter

**From the President's Desk:**  
**New concept papers**

**Upcoming Job Analysis Survey**

**New Q&As**

**Partner Spotlight**

**Appraiser Talk**

### Upcoming Events

**April 10:** [AQB Public Meeting](#)

**May 14-16:** [BOT Public Meeting](#)

### Contact Us

T 202-347-7722

info@appraisalfoundation.org

www.appraisalfoundation.org

### Follow Us





I do hope you will all take this unique opportunity to share your feedback with both boards as they consider these important topics. Your input will shape the future of the profession!

Sincerely,  
Kelly Davids  
President

## Upcoming Job Analysis Survey

The AQB plans to launch a new Job Analysis survey this week and your feedback is crucial!

This is earlier than the usual five-year cycle, that has been traditionally followed for this survey, but the AQB has deemed this feedback critical to its comprehensive review of the qualification criteria.

Keep an eye on your inbox this week to be informed as soon as the survey is released. Please take the time to fill out this questionnaire and encourage those in your networks to do the same.

You can play a central role to the AQB's work by completing the Job Analysis Survey.

## New Q&As

Both the Appraisal Standards Board and Appraiser Qualifications Board have released new Q&As covering a wide range of topics. Head over to the [Q&A page](#) on our website to stay up to date on the latest from both boards.

## Partner Spotlight

### American Society of Appraisers

You're invited to the premier symposium for personal property appraisers and allied professionals: Join us at ASA's Personal Property Appraisal Symposium this April!

([https://learn.appraisers.org/products/2025-asa-personal-property-appraisal-symposium#tab-product\\_tab\\_overview](https://learn.appraisers.org/products/2025-asa-personal-property-appraisal-symposium#tab-product_tab_overview)) Don't miss key events like the Global Valuation Review Symposium World Tour Part Three (May 22) (<https://learn.appraisers.org/gvrsworldtour>), the 2025 ASA Spring Fair Value Conference

([https://learn.appraisers.org/products/2025-asa-spring-fair-value-conference#tab-product\\_tab\\_overview](https://learn.appraisers.org/products/2025-asa-spring-fair-value-conference#tab-product_tab_overview)) on May 8th, the 2025 Beyond Valuation and Professional Development Conference on May 29, 2025, and the 14th Annual ASA Equipment Valuation Conference on May 13th

(<https://learn.appraisers.org/products/14th-annual-asa-equipment-valuation-conference>). Explore highlighted courses this April and May including GJ202 (<https://learn.appraisers.org/products/gj202-foundation-ii-appraising-gems-jewelry-for-insurance-scheduling-4>),

BV202 (<https://learn.appraisers.org/products/bv202-introduction-to-business-valuation-income-approach-9>), ME204

(<https://learn.appraisers.org/products/me204-report-writing>), ME201(<https://learn.appraisers.org/products/me201-introduction-to-machinery-equipment-valuation-cost-approach-to-value-3>),

GJ103 (<https://learn.appraisers.org/products/gj103-fundamentals-of-jewelry-appraisal-8>), ME203

(<https://learn.appraisers.org/products/me203-the-income-approach-advanced-topics-2>), PP204 (<https://learn.appraisers.org/products/pp204-personal-property-valuation-the-legal-and-commercial-environmentsand>), and BV203 (<https://learn.appraisers.org/products/bv203-introduction-to-business-valuation-asset-based-approach-discounts-and-diverse-practice-areas-7>). Looking ahead – registration is open for the 2025 PP Appraisal Summer Camp (<https://learn.appraisers.org/products/2025-personal-property-appraisal-summer-camp>) and the 2025 ASA ESOP Conference (<https://learn.appraisers.org/products/2025-asa-esop-virtual-conference>)!

### **American Society of Farm Managers and Rural Appraisers**

About the American Society of Farm Managers and Rural Appraisers (ASFMRA)

The American Society of Farm Managers and Rural Appraisers (ASFMRA) is the premier organization for rural property professionals, providing education, networking and professional development opportunities for farm managers, appraisers and consultants across the country. Among its signature events is the Leadership Excellence (LEX) Conference, a gathering focused on developing chapter and national leaders through interactive sessions and peer-to-peer learning. This year's LEX Conference is already sold out. ASFMRA's next major event, Education Week, will be held July 18-26 in Omaha, Nebraska and offers a full slate of appraisal and farm management courses, industry updates and networking opportunities. Registration for Education week will be opening soon. Learn more at <https://www.asfmra.org/conferences/national-conferences>.

### **Appraisers Association of America**

On April 16, 2025, the Appraisers Association of American will be holding their 18th Annual Award Luncheon honoring Jack Shainman, founder and director of Jack Shainman Gallery who will be in conversation with Linda Yablonsky, writer, curator and artist. For more information, visit [www.appraisersassociation.org](http://www.appraisersassociation.org)

### **International Association of Assessing Officers**

IAAO is offering Zoom chats to answer questions and share experiences about earning an IAAO designation. The next chat, Thursday, April 10, will be on earning the CAE and RES designations. There is no charge to attend and for more information or to register, go to <https://www.iaao.org/designations/designation-discourse>. Contact me if you have questions - Mike Ardis, [ardis@iaao.org](mailto:ardis@iaao.org)

### **International Society of Appraisers**

ISA's Assets 2025 starts April 2nd in Washington D.C. – there is still time to join us! Upcoming for ISA Education is our Arts & Crafts webinar in May, ISA's 4th Annual Gems & Jewelry Symposium and the ISA Education Foundation Business Webinar in June. Click here for all continuing education courses: <https://www.isa-appraisers.org/courses>

### **National Association of Appraisers**

The National Association of Appraiser welcomes new board members, Jason Covington, MNAA (TN) and Cathy Harper, MNAA (TX), as well as Barry Phillips, MNAA (SC) returning for a second term. As we kick off the ACTS Conference in San Antonio, April 5, we have set a new record for attendance at 350+, which

include 120+ first time attendees. It is exciting to see so many boots on the ground appraisers and industry leaders coming together to learn, network, and advance the profession.

#### **National Association of Mortgage Brokers**

Big things are buzzing at the National Association of Mortgage Brokers! This April, we're launching NAMB Hive, our brand-new online community designed to connect, collaborate, and empower mortgage professionals across the country. Don't miss our upcoming webinars, including Understanding VA Loans on April 10th and Social Media Compliance Tips on April 24th—both packed with insights to help you grow and stay compliant.

Link to NAMB Hive - <https://namb.org/resources/hive/>

Link to Events Calendar - [https://namb.org/inspire\\_events/](https://namb.org/inspire_events/)

#### **North Carolina Professional Appraisers Coalition**

Whether you're just starting out or gearing up for your national licensing exam, NCPAC invites anyone from any state to join our FREE weekly national exam test prep study group. No membership required—just real support, real prep, and real results. Join us May 8–9 in Myrtle Beach, SC for two days of education, networking, and community with fellow appraisers.

#### **Royal Institute of Chartered Surveyors**

RICS is holding its annual flagship conference on May 7, 2025, in partnership with NYU Stern's Chen Institute of Real Estate Finance. The conference "Policy, Politics, and Technology: What's Next for Global Real Estate" focuses on how industry and professionals can navigate these uncertain times. Early-bird registration ends on April 6th - please register here: <https://www.eventbrite.com/e/nyu-rics-americas-conference-2025-policy-politics-and-technology-tickets-1268105199789?aff=oddtcreator>

### **Appraiser Talk**

Stay up to date on Appraiser Talk!

You can check out all episodes [here](#).

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 Kaufman at [amy@appraisalfoundation.org](mailto: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 information on The Appraisal Foundation is available at [www.appraisalfoundation.org](http://www.appraisalfoundation.org).

[Manage Your Subscription](#)

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The Appraisal Foundation  
1155 15th Street NW STE 1111  
Washington, DC 20005

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**From:** The Appraisal Foundation <news@appraisalfoundation.org>  
**Sent:** Monday, March 31, 2025 8:39 AM  
**To:** Kohtz, Tyler  
**Subject:** STATE REGULATOR NEWSLETTER: Additional Experience Options



Good morning,

As the first quarter is coming to a close, we wanted to send out our first state regulator newsletter of 2025 to share some important updates. This is packed with helpful information and some important upcoming dates, so be sure to read all the way to the end.

Earlier this month, the Appraiser Qualifications Board took the next step in their comprehensive review of the qualification criteria by releasing their newest concept paper on additional experience options. This concept paper follows the work they did last year looking at college course and degree-related requirements.

This concept paper is focused on experience in fields related to appraising, how such experience might fulfill current requirements, and how that might be measured. As the regulators responsible for reviewing submitted experience to determine credential eligibility, you have a unique perspective on these issues—and the AQB wants to hear from you.

We hope you will consider submitting a comment on this concept paper or contact me directly to share your input informally if that's easier. You can read the concept paper [here](#), and the comment portal is [here](#). The public comment deadline is May 9th.

I also wanted to make you aware that the AQB plans to launch a new Job Analysis survey in the coming weeks. Although we have traditionally followed a five-year cycle for this survey, the AQB is launching it early because this feedback is critical to its comprehensive review of the qualification criteria.

We hope that you will consider sharing this survey with appraisers in your state when it is released. Their responses will be crucial to the AQB's work.

As always, please do not hesitate to reach out at any time. We hope to see you at our upcoming events very soon!

### In This Newsletter

**From Lisa's Desk: Additional Experience Options**

**Upcoming Events!**

**New Q&As**

**Appraiser Talk**

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### Contact Us

T 202-347-7722

info@appraisalfoundation.org

www.appraisalfoundation.org

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### Follow Us



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### Share this Newsletter

Click [here](#) to get a shareable link of this month's newsletter to share on social media.

Sincerely,

Lisa Desmarais  
Vice President of Appraisal Issues

## Upcoming Events!

April is packed with upcoming events just for state regulators!

Be sure to join us on April 3rd for state regulator orientation. This is designed to introduce new state regulators to the appraiser regulatory system or to provide a refresh for current regulators. You can register [here](#).

Then on April 16th, be sure to join us for the first State Regulator Advisory Group of 2025. This regular virtual gathering of state regulators is a unique opportunity to hear about the ongoing work of the Foundation, ask questions, and hear from fellow regulators. You can register [here](#).

## New Q&As

Both the Appraisal Standards Board and Appraiser Qualifications Board recently put out new Q&As covering a wide range of topics. Of particular interest to the state regulator community, the AQB has compiled all of their Q&As on the forthcoming Fair Housing and Valuation Bias required education into one place. Be sure to head over to our [Q&As page](#) to get the latest.

## Appraiser Talk

Stay up to date on Appraiser Talk!

You can check out all episodes [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](mailto: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 information on The Appraisal Foundation is available at [www.appraisalfoundation.org](http://www.appraisalfoundation.org).

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The Appraisal Foundation  
1155 15th Street NW STE 1111  
Washington, DC 20005



# Additional Experience Options: Should They Have a Place in Appraiser Qualifications?

An Appraiser Qualification Board's Concept Paper

March 13, 2025



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



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# Welcome

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We invite all stakeholders to participate in a crucial discussion regarding a matter of significant importance in our field: ***whether additional experience should have a place in meeting the qualifications for credentials as a real property appraiser.*** As one of the stewards of the appraisal profession's qualifications, we are examining the requirements in the Real Property Appraiser Qualifications Criteria (*Criteria*). This effort requires our full commitment to understanding the nuances of this issue before reaching any potential conclusions.

We urge you to join us in this important endeavor by reading this Concept Paper so that you can prepare and provide your feedback and insights. In the following pages, you will find a brief summary of how we are considering this reassessment of qualification criteria, followed by points to consider as you prepare your feedback, a high-level explanation of the *Criteria's* experience requirements (and their history), and a series of questions we would like you to reflect on.

Your participation at this early stage is essential, and we sincerely appreciate any feedback you choose to share with us as we explore this topic.

***Lastly, a Note on Terminology:*** *As we embark on this discussion, we want to clarify a shift in how we're framing this concept. In previous communications, we referred to this idea as "alternative experience." After refining our approach for this Concept Paper, we've renamed it "additional experience" to better reflect its purpose: expanding the types of experience that can count toward the Criteria's requirements, in addition to what is currently allowed. This isn't a wholly new concept—it builds on past conversations with you, our stakeholders, and we're eager to hear your thoughts on this evolution.*

If you have any questions, please contact the Board at [AQB@appraisalfoundation.org](mailto:AQB@appraisalfoundation.org).

Jerry Yurek  
Chair, Appraiser Qualifications Board

## Join the Conversation

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The Appraisal Qualifications Board (AQB) will host a Public Meeting to discuss current projects on April 10, 2025 from 1:00 pm - 2:30 pm ET. The Board will use this time to discuss current projects as well as discuss the concept paper. Register [here](#) to attend the Public Meeting.

All interested parties are encouraged to comment in writing to the AQB before the deadline of May 9, 2025. Each member of the AQB will thoroughly read and consider all comments.

### Send Your Comments by May 9, 2025

To submit your responses to questions and comments, please visit:

<https://www.surveymonkey.com/r/AQBComments>

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

[AQB@appraisalfoundation.org](mailto:AQB@appraisalfoundation.org).

# Reassessing the *Criteria*

## Project Overview

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In 2023, the Appraiser Qualifications Board (AQB) initiated a comprehensive review of the *Real Property Appraiser Qualification Criteria (Criteria)*. This review aims to ensure that qualification requirements for appraisers remain relevant and reflective of the evolving needs of the profession, advancements in technology, and shifts in the regulatory landscape. The goal is to align with the expectations of stakeholders and the public regarding the qualifications of newly credentialed appraisers.

To guide this effort, the AQB developed a phased work plan with clear milestones, designed to ensure meaningful progress while allowing flexibility in outcomes.

The project is structured around three main phases:

- **Phase One:** Reassessing the role of college degree requirements and related qualifications within the *Criteria*.
- **Phase Two:** Exploring the potential of allowing additional experience, such as experience from related professions, as a pathway to meet qualifications within the *Criteria*.
- **Phase Three:** Evaluating the structure and requirements of the National Exams for appraiser credentials.

**Additional Note Clarifying "Additional Experience":** Throughout this reassessment, you may notice we've shifted terminology from "alternative experience," used in earlier discussions, to "**additional experience**." This change reflects our intent to broaden the scope of qualifying experience beyond the current *Criteria*, adding new pathways while preserving existing standards. This concept has been part of our ongoing dialogue with stakeholders, and this paper represents the next step in refining how we define and integrate it.

## Phase One: College Requirements

Phase One focused on revisiting the necessity and relevance of college degree requirements. Stakeholders expressed concerns and advocated for their removal, prompting the AQB to carefully examine the issue. The AQB concluded there is a valid reason to consider eliminating college-related requirements; however, determining whether this is the correct course of action requires further study.

To advance this exploration, the AQB is preparing to conduct an Occupational Analysis—a systematic process to collect and analyze data about the duties, skills, and qualifications needed for the appraisal profession. This analysis will provide a comprehensive understanding of the competencies required for various appraiser roles and will inform any potential changes to the *Criteria*. Appraisers and stakeholders should anticipate the release of this survey in early spring.

## Phase Two: Additional Experience

With Phase One complete and the occupational analysis underway, the AQB has now turned its focus to Phase Two: exploring the concept of additional experience as part of the qualification process. Currently, all qualifying experience must come from USPAP-compliant appraisal reports. Some stakeholders have suggested that relevant experience from other professions, such as real estate, construction, or finance could potentially serve as an additional experience to meet certain requirements.

This phase will examine the viability of integrating additional experience into the *Criteria*, assessing its potential to complement the existing pathways to credentialing. As with Phase One, the AQB's exploration of this topic is not intended to pre-determine outcomes. Instead, this Concept Paper is an invitation for stakeholders to engage in discussion, provide feedback, and share perspectives. Any consideration of changes to the *Criteria*, including the potential for additional experience will be guided by a commitment to maintaining public trust, upholding rigorous standards, and ensuring that any new pathway remains substantive and meaningful.

## An Open and Collaborative Approach

The AQB remains committed to transparency and public engagement throughout this project. Stakeholder input is crucial at every stage, and the AQB will continue to issue discussion drafts, host listening sessions, and solicit diverse viewpoints.

Note that the AQB's overall goal of this reassessment project is to explore:

**Whether the *Real Property Appraiser Qualification Criteria* includes only essential qualification requirements.**

Concept Paper – Additional Experience Options: Should They Have a Place in Appraiser Qualifications?

At the conclusion of this project, the AQB will be able to conclude if any adjustments to the *Criteria* are necessary, and if they are, they will have relevant research and logic to back up proposed changes.

# Exploring Additional Experience Pathways

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***A note on "additional experience":** As we explore this topic, we've updated our terminology from "**alternative experience**," used in past discussions, to "**additional experience**." This shift emphasizes that we're proposing to expand the types of experience that can satisfy the *Criteria's* requirements, supplementing rather than replacing current pathways. This builds on ideas we've previously shared, now clarified through this paper's framework.*

Over the years, the question of whether additional ways to meet experience requirements should be considered has come up repeatedly. This concept, referred to as "additional experience," represents a form of experience that differs from how the Appraiser Qualifications Board (AQB) currently defines it in the *Criteria*. Specifically, it refers to experience that could be recognized toward meeting qualification requirements, even though it does not align with the current pathways to qualified experience.

The AQB has traditionally defined experience based on demonstrating the ability to competently complete the appraisal process, ensuring that individuals possess the foundational skills, knowledge, and competencies necessary to promote professionalism and public trust in the valuation profession. As currently outlined in the *Criteria*, experience must meet the following standards:

- **Timing:** All experience must be obtained after January 30, 1989.
- **USPAP Compliance:** The work must comply with the Uniform Standards of Professional Appraisal Practice (USPAP).
- **Scope of Work:** Experience must involve appraisal work conforming to Standards 1, 2, 3, 4, 5, and/or 6, where the appraiser demonstrates proficiency in appraisal principles, methodology, procedures (development), and reporting conclusions.

These requirements create a clear and rigorous framework for gaining experience, ensuring appraisers develop critical skills and abilities. However, this structure has traditionally limited experience to work directly tied to completing appraisals. This approach overlooks the possibility that foundational knowledge and skills—separate from qualifying education—can also be gained through related professional activities outside direct appraisal work. For example, activities such as real estate sales, property data analysis, or market research may contribute to a broader understanding of valuation concepts. While these experiences do not replace qualifying education or direct appraisal experience, they could offer a structured way to develop relevant

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competencies that support an individual’s readiness to complete USPAP-compliant appraisal work. As such, the role of foundational knowledge in appraiser qualifications merits further exploration.

Recent advancements, such as Practical Applications of Real Estate Appraisal (PAREA) and adjustments to practicum experience pathways, reflect the AQB’s commitment to exploring innovative ways to meet experience requirements while maintaining rigorous standards. These initiatives have demonstrated new possibilities for how experience can be recorded, evaluated, and assessed.

Currently, for trainees, a requirement across all experience pathways—Supervisor-Trainee, PAREA, and Practicum—is that each includes oversight by a qualified appraiser. This ensures when appraisers-in-training are completing appraisal related work and assignments, they are developing their skills under the guidance of a credentialed professional. Any additional experience model would represent a fundamental departure from this structure, as it would not necessarily (though it might) involve direct supervision. This distinction is critical in evaluating whether such a pathway could maintain public trust and ensure competency.

Therefore, building on these insights, the AQB has identified two potential approaches for additional experience that could merit inclusion in the *Criteria*: “Foundational Knowledge” and “Establishing Equivalency Between Standards.”

While this topic has been explored in the past, trial and error, feedback, and a deeper understanding of what USPAP-compliant experience entails have provided fresh perspectives. These insights suggest that additional experience could be approached in a way that enhances public trust, aligns with rigorous standards, and ensures it is a meaningful and substantive pathway.

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# Your Input Is Needed!

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To fully explore the viability of additional experience, we invite you to provide input on several key questions outlined on the next page. These questions are designed to help evaluate how such pathways might fit into the *Criteria*.

***For additional context or clarification on the key issues to consider as you prepare your feedback, please refer to the appendices, which contain important, detailed proposals and information.***

## Questions for You

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### Questions on Additional Experience

#### 1. Value of Additional Experience

- Should all qualifying experience for appraiser credentials be limited to completing USPAP-compliant appraisal reports, or should certain types of appraisal-related or non-appraisal-specific experience also be considered?
  1. If you believe certain appraisal-practice related experience—such as developing a scope of work, conducting market analysis, performing highest and best use studies, inspection (physical or visual) or researching depreciation—should count, even if it does not result in a final appraisal report or is not part of an appraisal or appraisal review assignment, please explain why and what safeguards should apply.
  2. If you believe that relevant experience from outside the appraisal profession—such as market analysis performed by real estate brokers, site selection by engineers or urban planners, or other valuation-related work—should count toward qualifications, please explain your rationale and what types of experience should be considered.
  3. If you believe that only direct USPAP-compliant appraisal work should qualify, explain why.

## 2. Safeguards and Risks

- What safeguards should be in place to ensure any additional experience enhances preparation for appraisal work without lowering standards?

## 3. Balancing Standards and Flexibility

- What are the key benefits or risks of allowing additional experience to count toward qualification?

## Questions on “Foundational Knowledge” and “Standards Equivalency” Concepts

### 4. Viability of “Foundational Knowledge”

- Do you see the “Foundational Knowledge” option included in the appendices of this concept paper as viable? If so, what changes or safeguards would you suggest?
- Do you see the “Standards Equivalency” option included in the appendices of this concept paper as viable? If so, what changes or safeguards would you suggest?

### 5. Practical Considerations

- How might incorporating “Foundational Knowledge” or “Standards Equivalency” supplemental experience impact the pathway to becoming an appraiser, both positively and negatively?
- What portion of the total required experience hours (e.g., a percentage or specific number of hours) do you think should be allowed to count as ‘Foundational Knowledge’ experience, and why? Please explain your reasoning, considering how this balance might affect competency, public trust, and accessibility to the appraisal profession.

## Final, General Question

### 6. Experience Hours

- Do you consider the total number of experience hours required for any (or all) of the credential levels to be too many or too few? If yes, why and what rationale do you have for increasing or decreasing the required number of experience hours? If no, please provide your rationale.

## Send Your Comments by May 9, 2025

To submit your responses to question and comments, please click on this Survey Monkey link: <https://www.surveymonkey.com/r/AQBComments>

While 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 [AQB@appraisalfoundation.org](mailto:AQB@appraisalfoundation.org).

# APPENDIX A

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## Understanding Experience Requirements in the *Criteria*: History, Framework, and Rationale

### *Historical Context: Why USPAP Compliance Is the Cornerstone*

Before the Uniform Standards of Professional Appraisal Practice (USPAP) were implemented in 1989, the appraisal profession lacked a unified set of standards. Different organizations and states followed varying guidelines, leading to inconsistencies in appraisal practice. This created significant risks for financial institutions, property owners, and public trust. The Financial Institutions Reform, Recovery, and Enforcement Act (FIRREA) of 1989 brought USPAP into federal law, mandating compliance for appraisers involved in federally related transactions.

The implementation of USPAP established a single, national standard for appraisal practice. This ensured that appraisers across the country followed consistent ethical, procedural, and technical guidelines. To meet the public trust mandate, appraisers must not only learn USPAP in theory through qualifying education and exams but also demonstrate the ability to apply USPAP in practice by completing compliant appraisal assignments. This principle has guided the design of the experience requirements in the Real Property Appraiser Qualification Criteria (*Criteria*) ever since.

### What Defines Appraisal Experience?

Appraisal experience, as defined in the *Criteria*, is much more than the completion of tasks. It encompasses engagement in the **full appraisal process**, which includes:

1. **Analyzing factors that affect value.**
2. **Defining the problem and determining the scope of work.**
3. **Gathering and analyzing data.**
4. **Applying appropriate methods and techniques.**
5. **Arriving at an opinion of value.**
6. **Reporting results in compliance with USPAP.**

This comprehensive approach ensures that appraisers develop a deep, practical understanding of the entire process, preparing them for real-world scenarios and fostering confidence in their ability to perform independently.

## *The Importance of Verification and Oversight*

### **Early Challenges and Lessons Learned**

Initially, experience verification was minimal. Appraisers would submit logs of completed assignments, and states often relied solely on attestations without reviewing specific work. Over time, it became clear this approach lacked sufficient oversight, leading to abuse and inconsistencies. For example, some trainees gained credit for work that was never properly completed or USPAP-compliant.

In response, the AQB and state regulatory bodies introduced stricter verification measures, balancing the need for accountability with practicality. These measures ensure that appraisers can demonstrate proficiency without overwhelming state resources.

### **Current Verification Mechanisms**

1. **Logs:** Trainees must maintain detailed logs that document their work, including the type of property, date of the report, address, description of work performed, and hours spent on the assignment. These logs are essential for tracking the trainee's progression.
2. **Sampling Reports:** Rather than reviewing every assignment, states typically select a sample (e.g., three reports) for detailed review. This ensures the trainee's work reflects USPAP compliance and competency while minimizing administrative burden.
3. **Supervisor Oversight:** Supervisors play a critical role in ensuring trainees complete USPAP-compliant assignments. Supervisors must sign off on logs confirming the trainee's work, adding an additional layer of accountability.

### **Pathways to Gaining Experience**

There are currently three primary pathways for appraisers to gain the required experience:

1. **Supervisor-Trainee Model:**
  - Trainees work under the direct supervision of a qualified appraiser.
  - All appraisal reports completed during this time are for actual clients and subject to real-world scrutiny.
  - Supervisors ensure reports meet USPAP standards before submission to clients.

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## 2. PAREA (Practical Applications of Real Estate Appraisal):

- PAREA offers a controlled, simulated environment where trainees complete at least three USPAP-compliant appraisal reports.
- The program is pre-approved by the AQB, ensuring consistency and oversight.
- Participants learn in structured modules, mastering each component of the appraisal process before moving to the next.

## 3. Practicum Courses:

- Practicum courses combine classroom learning with supervised practical experience.
- These courses must also result in USPAP-compliant reports, verified by qualified supervisors.

### *Balancing Accountability with Practicality*

A key challenge in designing and enforcing experience requirements is finding the right balance between accountability and practicality:

- **State Resources:** States have limited staff and must balance experience verification with practical constraints. The Supervisor-Trainee Model is the most time-consuming, requiring logs and report reviews by regulators. PAREA, by contrast, has a minimal regulatory burden, as completion is verified through a certificate of completion (unless a state imposes additional requirements).

Any supplemental experience must not be more burdensome than any of the current methods to remain feasible for state regulators.

- **Enforcement Mechanisms:** By requiring supervisors and programs like PAREA and practicum courses to confirm USPAP compliance, the system creates multiple layers of accountability without adding excessive bureaucracy.
- **Legal and Compliance Requirements:** Federal law mandates and clients often require USPAP compliance for appraisers. This legal framework underpins the *Criteria* and ensures public trust in the appraisal profession.

### *Risks of Additional Experience Models*

Proposals to allow non-USPAP-compliant experience (e.g., work in related fields like real estate or property management) must address significant risks:

Concept Paper – Additional Experience Options: Should They Have a Place in Appraiser Qualifications?

- **Public Trust:** Deviating from USPAP compliance undermines the profession's credibility and consistency.
- **Competency:** Appraisers who lack USPAP-compliant experience may not fully understand the ethical, procedural, and technical standards required in their work.
- **Regulatory Oversight:** States would face greater challenges in verifying nontraditional experience, increasing the risk of inconsistencies and abuse.

For any additional experience pathway to be viable, it must reinforce public trust, adhere to rigorous standards, and provide a meaningful and substantive route.

### *Why USPAP Compliance Matters*

Experience requirements are not just about logging hours; they are about ensuring appraisers can apply USPAP in real-world scenarios. This involves rigorous verification, supervision, and documentation processes designed to uphold the profession's integrity and maintain public trust. Any proposed changes to these requirements must carefully consider their impact on legal obligations, state resources, and the profession's core mission.

The current system, while not without challenges, reflects decades of lessons learned. It is designed to balance the need for thorough oversight with the practical realities of training and certifying competent appraisers. Ensuring USPAP compliance remains the cornerstone of the *Criteria*, safeguarding the credibility of appraisers and the appraisal process.

### *Submitting Ideas for Additional Experience*

If you are considering submitting an idea for additional experience pathways, it's important to approach the topic thoughtfully and address the key considerations outlined here. Be sure to explain how your proposal would maintain or enhance USPAP compliance, uphold public trust, and ensure appraisers develop the competencies required by federal law. Additionally, consider the practical implications for state regulators, supervisors, and trainees, as well as the mechanisms needed to verify and enforce the experience. In other words, should some additional non-valuation experience satisfy a portion of the experience required to obtain a credential?

While additional ideas are welcome, to be seriously considered, they must be grounded in a clear understanding of the current framework and the reasons it exists. By addressing these elements thoughtfully and constructively, you can contribute meaningfully to the ongoing evolution of the profession while respecting the core principles that have guided it for decades.

Concept Paper – Additional Experience Options: Should They Have a Place in Appraiser Qualifications?

# APPENDIX B

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## The Exploration of the Concept and Details of Experience Over Time

As outlined above, appraisal experience is defined and judged through a structured process, with layers of oversight to ensure credibility and USPAP compliance. Over time, the system has evolved to address inadequacies and gaps, leading us to the current point of considering additional experience models. While additional experiences have been discussed in the past, the lack of feasible solutions prevented significant progress. However, recent developments, particularly with programs like PAREA, have changed the landscape, providing new opportunities for rethinking the approach. Additionally, the practicum allowance was expanded from covering only 50% of the required experience to now allowing 100%, further demonstrating a shift toward structured additions to traditional experience pathways

One of the most important lessons learned through PAREA's development is the power of structured programs. Unlike the supervisor-trainee model, where experience is shaped by the varying assignments that come up day-to-day, PAREA offers a consistent, comprehensive curriculum. It ensures that all participants are taught the same essential skills and complete a well-defined program, offering a level of standardization previously unavailable.

In addition to PAREA, advancements in education and technology have reshaped what's possible. When discussions about additional experience began years ago, synchronous and asynchronous education were not widely accepted or feasible at the necessary scale. Today, advancements in virtual education platforms, combined with improvements in tools including appraisal software, aerial imagery, and digital measurement technologies, have dramatically expanded the capabilities for remote and virtual training. These changes make it possible for trainees to achieve exceptional levels of training in a virtual or remote environment, engaging with the complete appraisal process in ways that were unimaginable even a decade ago.

Moreover, through PAREA and practicum programs, the industry has gained clarity on the mechanics of documenting and teaching the appraisal process. Policies and practices have been refined, providing a more structured approach to addressing issues including compliance, supervision, and skill mastery. These advancements demonstrate that additional experience models, which once seemed impractical, are now more achievable than ever.

This section isn't intended to dive into every detail of the discussions and research held over the years, rather it highlights the philosophical shift: as methods for gaining experience have expanded and matured, the conversation about additional experience

Concept Paper – Additional Experience Options: Should They Have a Place in Appraiser Qualifications?



is no longer theoretical. It is grounded in real-world solutions that account for the modern tools and training methodologies available today. With programs like PAREA and practicums coming to fruition in the last few years proving that rigorous training and consistency can be achieved outside of the “traditional supervisor-trainee model,” the possibility of exploring broader definitions of experience is more viable than ever before.

# APPENDIX C

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## “Foundational Knowledge” Concept

### Explanation

The **Foundational Knowledge** concept would allow a yet to be determined amount of general real estate-related experience to count toward the total appraisal experience requirement. This recognizes that critical skills and insights relevant to appraisal practice can be developed outside of USPAP-compliant assignments, through diverse experiences such as market analysis, compliance reviews, property data collection, and real estate management.

This concept acknowledges the practical reality that appraisal-related knowledge can come from a wide variety of backgrounds. Instead of seeking exact equivalencies or rigid comparisons for every potential qualifying activity, this framework emphasizes flexibility and feasibility. The goal is to create a practical, adaptable requirement that recognizes the value of foundational knowledge without imposing excessive bureaucratic complexity.

The Foundational Knowledge concept addresses the transitional phase between completing qualifying education (QE) and gaining direct appraisal experience. This phase involves developing or refining essential skills—such as understanding forms, data sources, market-specific practices, and analytical tools—that are critical for effectively engaging in the appraisal process. It also acknowledges that some individuals may already enter the profession with this type of knowledge. By offering state regulatory agencies discretion, this approach ensures that training standards are upheld while providing a structured way for trainees to bridge this critical learning period or demonstrate their readiness to fully engage in the appraisal process.

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### How It Works

#### 1. Premise of Foundational Knowledge:

Foundational Knowledge would be connected to appraisal practice (see the table called “What Might Constitute Foundational Knowledge” later in this document).

Foundational Knowledge refers to the essential skills, concepts, and practical insights that support an individual’s development into a competent appraiser. While qualifying education (QE) provides a theoretical foundation in economic principles, valuation methodologies, and regulatory frameworks, it does not

necessarily expose aspiring appraisers to the practical tools, research techniques, and industry-specific skills they will need in the field.

This type of knowledge can come from both appraisal-related tasks that do not result in a USPAP-compliant appraisal report and broader real estate or analytical experiences that develop relevant competencies. It includes activities such as market trend analysis, property data research, zoning and land use studies, economic data interpretation, and the use of valuation technology. Additionally, it may involve experience from adjacent professions—such as real estate brokerage, construction, property management, or finance—where individuals gain transferable skills in property evaluation, market analysis, or regulatory compliance.

Foundational Knowledge serves as a bridge between theoretical education and hands-on appraisal practice, ensuring that aspiring appraisers build a well-rounded skill set that supports valuation work, even if the experience itself is not gained through USPAP compliant appraisals.

## 2. **Yet-to-be-determined experience hours allowed:**

- A certain number of foundational knowledge hours will be allowed as part of the total experience requirement.
- These hours are optional and may be incorporated into different pathways, including pre-trainee work experience, supervised foundational activities under a qualified appraiser, or appraisal practicum programs.

## 3. **Pathways for Gaining Foundational Knowledge Hours:**

- **Activities Conducted Under a Qualified Appraiser Supervisor:**
  - Individuals working under a qualified appraiser supervisor may count foundational knowledge hours toward their required total, based on state-approved criteria.
  - States will determine how to allocate hours for qualifying activities, however, the AQB could provide general guidance, so states feel comfortable making these decisions.
  - In other words, working under a supervisor does not mean foundational knowledge credits towards experience is unavailable—trainees can still develop skills such as learning appraisal software, using spreadsheets for data analysis, etc.

- **Activities Conducted Under a Practicum Program with a Qualified Supervisor:**
  - Practicum programs may allocate a yet-to-be-determined number of foundational knowledge hours as part of their structured curriculum, offering lessons or activities designed to build foundational skills.
  - Examples of activities include:
    - Learning property research tools.
    - Understanding market trends.
    - Developing data analysis skills.
- **Activities Conducted Within a PAREA Program with a Qualified Mentor:**
  - Any additional credit of foundational knowledge hours is **not applicable to PAREA programs**, as these programs are already self-contained and provide all required experience through an integrated, comprehensive structure.
- **Learning and Experience Outside of PAREA, Practicum or Supervisory/Trainee Programs:**
  - Foundational knowledge may also be gained through work-based experience outside of structured supervision or mentorship.
  - Examples may include:
    - Gaining experience in real estate data collection, zoning research, or regulatory analysis.
    - Working as a real estate agent over a period of time.
    - Learning to and using appraisal-related technology, mapping tools, or financial modeling software.

**4. Possible Examples of Foundational Knowledge may include:**

- **Real Estate Knowledge:**
  - Managing rental properties, and leasing.

- Conducting Comparative Market Analyses (CMAs).
- Experience related to property construction, zoning, and land use.
- **Non-Appraisal-Related Work:**
  - Compliance reviews tied to property values or transactions.
  - Market analysis for real estate trends or property performance.
  - Collecting and/or analyzing property data from public records or property data listing services.
  - Measuring properties and documenting physical characteristics.
- **Broader Real Estate Roles:**
  - Work in fields like property insurance, mortgage lending, or title work.
  - Experience in urban planning, economic development, or similar professions.

#### 5. State Flexibility with a Foundational Knowledge List:

- States are required<sup>1</sup> to create a **Foundational Knowledge List** outlining:
  - The specific activities they recognize as counting towards foundational credits.
  - The corresponding yet-to-be-determined number of hours awarded for each activity.
    - A sample list is provided at the end of this section.
- **Why Flexibility Is Critical:**
  - The Foundational Knowledge concept is not about creating an exhaustive or overly prescriptive list of activities.
  - It acknowledges the diversity of experiences that can build foundational appraisal-related knowledge.

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<sup>1</sup> The AQB would issue guidance on how to develop this.

- Requiring rigid, one-to-one equivalencies across every activity would create an overly burdensome system for both applicants and regulators. Instead, this concept relies on general reasoning and fairness to ensure states can recognize meaningful contributions without excessive bureaucracy.

## 6. Integration with Practicum Programs:

- Practicum programs may incorporate appraisal-focused lessons or tasks that support foundational knowledge and are directly tied to the valuation process.
- These lessons are not Qualifying Education courses but serve as practical exercises that build competencies necessary for completing appraisals—such as understanding different data sources, evaluating the strengths and limitations of various research techniques, or learning how to analyze market trends specific to the type of property being appraised.
- The intent is not to introduce unrelated real estate topics, such as standalone courses on property management or real estate sales, but rather to provide deeper practical knowledge that enhances the appraisal process.
- While current practicum models focus on completing full appraisal assignments, this allows for a structured way to introduce foundational knowledge that supports valuation work without departing from the core purpose of the program.

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### What It Means

By allowing a yet-to-be-determined number of foundational knowledge credits, this concept ensures the majority of required experience hours remain dedicated to USPAP-compliant appraisal work. At the same time, it provides a practical acknowledgment of the wide range of experiences that contribute to developing the skills and insights necessary for appraisal practice.

This approach reflects a balance between rigor and flexibility. By empowering states to define and award these hours, the profession can accommodate diverse backgrounds and training pathways while maintaining high standards. Foundational knowledge recognizes that not all learning occurs within rigid appraisal assignments and offers an opportunity for aspiring appraisers to gain credit for meaningful, real-world experiences.

## What Might Constitute Foundational Knowledge

*This is a sample list for reference only—it is not a finalized or exhaustive list. It is intended to provide a general idea of the types of activities the AQB may consider as Foundational Knowledge, but no determinations have been made.*

Activity	Foundational Knowledge Gained	Connection to Appraisal Practice
<b>Real Estate Transactions</b>	Serving as a real estate agent or broker in client transactions.	Develops understanding of market participants, transaction structures, and factors influencing property value.
<b>Property Management</b>	Full-time property management, including operational oversight, leasing, and maintenance.	Provides insight into property performance, rent trends, and factors affecting income-producing properties.
<b>Market Analysis</b>	Conducting Comparative Market Analyses (CMAs) or evaluating market trends for property valuations.	Enhances ability to analyze market data, determine competitive positioning, and support Highest and Best Use (HBU) analysis.
<b>Data Collection</b>	Collecting property data (e.g., public records, MLS, tax rolls) for analysis.	Builds competency in gathering and verifying property characteristics, ownership history, and market data.
<b>Property Measuring</b>	Measuring properties and documenting physical characteristics for valuation purposes.	Develops accuracy in property descriptions and supports understanding of types of real property improvements and compliance with measurement standards (e.g., ANSI).
<b>Compliance Review</b>	Reviewing real estate compliance documents related to property value or transactions.	Enhances understanding of zoning, land use restrictions, and legal factors influencing valuation.
<b>Construction and Zoning Familiarity</b>	Gaining experience in understanding building plans, zoning regulations, or construction processes.	Improves ability to assess property feasibility, highest and best use, and conformity with market standards.
<b>Driving and Market Observation</b>	Driving neighborhoods or markets to understand trends, property types, or how location impacts value.	Supports site inspections, neighborhood analysis, and external influences affecting marketability.
<b>Software and Tools Training</b>	Learning appraisal-related software (e.g., ACI, Total), GIS, or Excel for valuation tasks.	Builds efficiency in data management, valuation modeling, and report preparation.
<b>Property Research and Analysis</b>	Researching public records, zoning data, or neighborhood analysis to support property evaluations.	Strengthens ability to verify data sources, analyze trends, and support valuation conclusions.
<b>Experience in Adjacent Professions</b>	Work in adjacent fields like property insurance, mortgage lending, title work, or urban planning.	Provides exposure to risk assessment, underwriting considerations, and regulatory influences on real estate.
<b>Supervised Foundational Tasks</b>	Tasks under an appraiser supervisor (e.g., learning software, discussing valuation concepts, reviewing data).	Reinforces key skills such as market research, valuation methodologies, and appraisal reporting.

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# APPENDIX D

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## “Standards Equivalency” Concept

### Introduction

The Standards Equivalency proposal is designed to address situations where appraisers have gained substantial experience under standards other than USPAP (Uniform Standards of Professional Appraisal Practice), such as the International Valuation Standards (IVS). This concept acknowledges the global nature of the appraisal profession and the potential for highly qualified professionals from other countries or sectors to bring valuable expertise to the U.S. appraisal field.

While USPAP compliance is the core standard for appraisal practice in the U.S., establishing equivalency between other standards like IVS and USPAP offers a pathway for experienced appraisers to demonstrate their competency without requiring redundant experience. This proposal ensures that any transition to USPAP standards maintains the rigor and integrity of the profession.

### Why Consider Standards Equivalency?

#### **Understanding USPAP Compliance:**

USPAP compliance involves more than simply adhering to general appraisal standards. It requires:

- A clear enforcement mechanism to evaluate compliance.
- Consistent judgment of reports against an established standard.
- Training for those who evaluate the reports to ensure consistent application of the standard.

Without these mechanisms, experience under non-USPAP standards cannot easily be judged or verified.

#### **International Context:**

Feedback has highlighted the challenge for experienced international appraisers who have worked under IVS or similar standards. These professionals often have substantial formal education and practical experience but have not practiced within the USPAP framework.

IVS and USPAP share many similarities, and the Appraisal Foundation has issued the USPAP to IVS Equivalency Document, which explains how the two standards correlate. Concept Paper – Additional Experience Options: Should They Have a Place in Appraiser Qualifications?



This document demonstrates that transitioning from IVS to USPAP is feasible without significant conceptual gaps.

### **A Practical Approach:**

The proposed program recognizes the practical reality that states may lack the resources to fully train their staff in IVS standards.

Instead, it creates a structured process for applicants to demonstrate their understanding of USPAP by converting their IVS-compliant reports into USPAP-compliant ones.

### **Program Details**

#### **Eligibility:**

- Applicants must provide evidence of completing the required hours of appraisal work under IVS or another AQB-approved standard.
- The log of appraisal hours must clearly document the scope and nature of the work performed.

#### **Report Conversion Process:**

- The applicant will be required to convert three randomly selected IVS-compliant appraisal reports into USPAP-compliant appraisal reports.
- The converted reports must:
  - Identify the state as the client (a non-traditional client scenario).
  - Reflect the USPAP standards and requirements for appraisal development and reporting.

#### **Credit for Experience Hours:**

- As a starting point for discussion, experience hours completed under IVS or another AQB-approved standard may be credited on an hour-per-hour basis toward the total required experience hours, provided the applicant successfully converts selected reports to USPAP compliance for review and approval or rejection by the state regulatory agency. This approach recognizes the value of prior appraisal experience while ensuring alignment with USPAP standards through the conversion process.

**State Review:**

- The state regulatory agency will review:
  - The original IVS-compliant reports.
  - The USPAP-compliant reports.
  - The applicant's written explanations.
- This review ensures that applicants not only understand the differences between the two standards but can also apply that understanding in practice.

**Written Explanation:**

- The applicant must submit a written explanation for each converted report detailing:
  - The differences between the original IVS report and the USPAP-compliant report.
  - The specific changes made to align the report with USPAP requirements.

**Approval of Equivalency Standards:**

- The Appraiser Qualifications Board (AQB) must approve any equivalency between USPAP and another standard (e.g., IVS).
- The AQB's review process will:
  - Evaluate the equivalency document to ensure compatibility between the two standards.
  - Require a formal proposal and review fee to assess the viability of establishing equivalency between the standards.

**Equivalency Document Development:**

- Currently, the USPAP to IVS Equivalency Document provides the foundation for this process.
- Future equivalency documents may be developed and approved by the AQB as needed.

**Benefits of the Proposal****Supports Global Competency:**

- This proposal allows qualified professionals with international experience to transition into the U.S. system without unnecessary duplication of work.

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**Maintains Rigor:**

- The conversion process ensures that all appraisers practicing in the U.S. understand and can apply USPAP standards.

**Flexibility for States:**

- States retain the ability to implement this program based on their regulatory needs and capacity.

**Resource-Efficient:**

- By requiring applicants to perform the conversion and provide detailed explanations, states can leverage the applicant’s expertise rather than bear the full burden of training staff on IVS standards.

**Implementation Considerations**

**Training for State Reviewers:**

- States may need minimal training to familiarize reviewers with IVS standards and equivalency documents.

**Applicant Fees:**

- Applicants may be required to pay a processing fee to cover the cost of report reviews and evaluations.

**Timeline for AQB Approvals:**

- The AQB will establish a process and timeline for reviewing and approving additional equivalency documents.



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# Appraiser Qualifications Board Q&A

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**Issue Date:** March 20, 2025

## Sophia Learning & The *Criteria*

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**Question:** An applicant for a credential upgrade in our state has completed the required coursework, including courses from Sophia Learning. These credits were transferred to a university who is an accredited institution per its website. The university accepted the Sophia Learning credits, and they now appear on the applicant's official transcript. Given this, can the applicant proceed with their exam for the credential upgrade?

**Answer:** Yes. The *Criteria* requires all college-level education to be obtained from a degree-granting institution by the Commission on Colleges, a national or regional accreditation association, or by an accrediting agency that is recognized by the US Secretary of Education. While Sophia Learning itself is not accredited in this manner, degree-granting institutions have the discretion to accept transfer credits from Sophia Learning. In this case, the university who is an accredited institution, has accepted the applicant's Sophia Learning credits and recorded them on the official transcript. Since the credits are now recognized as part of the applicant's academic record at the university, they meet the required educational criteria.



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APPRAISER QUALIFICATIONS BOARD

# Appraiser Qualifications Board Q&As

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**Issue Date:** March 20, 2025

## Introduction to this Compilation of Q&As

This document is a compilation of both previously issued and newly added Q&As related to the implementation of the Valuation Bias and Fair Housing Laws and Regulations Course (VB-FH Course) under the 2026 Real Property Appraiser Qualification Criteria. Normally, Q&As are issued separately and later compiled over time, but in this case, we have gathered them into a single document for the convenience of state regulators.

To distinguish the newly added Q&As, they are marked “NEW” next to the question. This format allows for easy identification of recent additions while maintaining access to all relevant guidance in one place.

Please review this document carefully and refer to the notations to identify new content.

## NEW Q&As:

### Upgrade Requirement for the VB-FH Course **NEW!**

**Question:** I earned my credential before January 1, 2026. Do I still need to take the 8-hour VB-FH Course if I plan to upgrade my credential after that date?

**Answer:** Yes. The 8-hour VB-FH Course (which includes a 1-hour exam) is required for all appraisers to upgrade their credentials after January 1, 2026. It doesn't matter when your original credential was earned; the 8-hour VB-FH Course must be completed as part of the educational requirements for the upgraded credential. This ensures that all appraisers are knowledgeable about valuation bias and fair housing issues.



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## Why the VB-FH Course is Not Listed in Upgrade Course Requirements

### NEW!

**Question:** Why doesn't the 8-hour VB-FH Course appear in the lists of required courses on page 26 of the 2026 *Criteria* for upgrading to a higher credential?

**Answer:** The 8-hour VB-FH Course is not included in the upgrade course lists because the 2026 *Criteria* are structured to outline what is required to obtain a credential under the new AQB *Criteria*, not to address situations where an individual has not completed one or more of the Required Core Curriculum (RCC) courses from a prior version of the AQB *Criteria*.

The upgrade course lists in the 2026 *Criteria* are meant to show only the additional coursework required beyond the RCC already required for the lower-level credential. For example, on page 26 of the 2026 *Criteria*, the additional 100 hours of coursework required to upgrade from Certified Residential to Certified General are listed. The 8-hour VB-FH Course is not included in this list because the 2026 *Criteria* assumes appraisers upgrading their credentials have already completed it as part of the RCC for a Certified Residential credential.

Because the 8-hour VB-FH Course was not required for credentials earned before 2026, some appraisers upgrading in the future may not have taken it. If an appraiser has not taken that or any course which is part of the RCC for their current credential, they must complete that Course before upgrading.

State agencies should ensure that appraisers who earned their credentials prior to 2026 are aware they **must** complete the 8-hour VB-FH Course before upgrading, even though it is not explicitly listed in the "upgrade lists" on page 26 of the 2026 *Criteria*.

## Upgrading Credentials Earned Before 2026 NEW!

**Question:** I earned my Licensed Residential credential before January 1, 2026. If I want to upgrade to Certified Residential after that date, do I need to take the 8-hour VB-FH Course?

**Answer:** Yes. Any appraiser upgrading their credential after January 1, 2026, must complete the **8-hour** VB-FH Course, regardless of when their initial credential was issued. Because the 8-hour VB-FH Course was not part of the RCC at the time you earned your Licensed Residential credential, you must complete it (including passing the 1-hour exam that is part of the Course) to meet the 2026 *Criteria* and qualify for an upgrade.



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## State Regulations and 8-hour VB-FH Course Requirements **NEW!**

**Question:** My state's regulations follow the 2026 *Criteria* but don't explicitly mention the 8-hour VB-FH Course for upgrades. Is the course still required?

**Answer:** Yes, the 8-hour VB-FH Course is required. The 2026 *Criteria* makes the 8-hour VB-FH Course a mandatory part of the RCC, which applies to **all** credentials and upgrades after January 1, 2026.

## Why Require the 8-hour VB-FH Course for Upgrades? **NEW!**

**Question:** Why is the 8-hour VB-FH Course required for appraisers to upgrade their credentials if they already hold a credential?

**Answer:** The 8-hour VB-FH Course is the first newly added requirement in the 2026 *Criteria* that applies universally to both newly credentialed **and** existing appraisers. This approach ensures that all appraisers, regardless of when their initial credential was earned, are educated on critical issues related to valuation bias and fair housing laws.

By applying the 8-hour VB-FH Course universally, the AQB has established a standard that reinforces professionalism and competency and maintains the public trust across the appraisal profession. This requirement ensures that no credentialing or upgrade scenario allows appraisers to bypass the 8-hour VB-FH Course, maintaining consistency, accountability, and necessary knowledge across all levels of credentialing.

## Qualifying Education (QE) and Continuing Education (CE) Differences for the VB-FH Courses **NEW!**

**Question:** Does the VB-FH Course requirement apply to both QE and CE?

**Answer:** Yes, but with differences. The 8-hour VB-FH Course is required for QE (7 hours of instruction plus a 1-hour exam) when earning or upgrading a credential after January 1, 2026. For CE, appraisers must take the 7-hour instruction portion of the 8-hour VB-FH Course during their first CE cycle after the 2026 *Criteria* becomes effective on January 1, 2026, followed by a shorter 4-hour VB-FH Course every two calendar years thereafter.

## Meeting QE with a CE Course **NEW!**

**Question:** If I took the 7-hour VB-FH CE course, does it count toward the 8-hour VB-FH Course required as QE?

**Answer:** No, it does not count toward the QE requirement. For it to count towards the QE requirement, you also must pass the 1-hour exam required for QE. The 7-hour VB-FH CE course



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alone does not meet the 8-hour VB-FH Course QE requirement.

However, an exception exists. The AQB wishes to inject some flexibility for upgrading appraisers when strict adherence to the above answer would provide little to no benefit.

Consider the following example:

An appraiser wishes to upgrade from Certified Residential to Certified General. The appraiser has just taken the 7-hour VB-FH CE Course during the last six months of their most recent CE cycle. According to the answer above, to qualify for Certified General, successful completion of the 8-hour VB-FH Course would be necessary, resulting in the appraiser's expenditure of time and money to relearn the same subject matter.

The AQB believes this result would be unduly burdensome and has concluded that the appraiser in these circumstances only needs to take and pass the 1-hour exam component of the 8-hour VB-FH QE Course, provided that both Courses are from the same educational provider. By taking and passing the 1-hour exam, that appraiser in substance would be completing the 8-hour QE Course. The six-month period is appropriate to help ensure the subject matter covered in the 7-hour CE course closely tracks that taught in the 8-hour QE Course.

The exam may be taken at a time different from when the course is taken; however, the exam must be the one associated with that specific course and educational provider. A student may not substitute an exam from a different course or provider to satisfy the requirement.

Please check with your state agency because it may adopt more stringent requirements than those outlined in the *Criteria*.

## Handling Credential Upgrades in States **NEW!**

**Question:** How should state agencies handle appraisers who earned their credentials before January 1, 2026, and now want to upgrade?

**Answer:** Subject to the above exception, State agencies need to require appraisers seeking to upgrade their credentials after January 1, 2026, to complete the 8-hour VB-FH Course. This course is part of the RCC for all credentials and must be enforced consistently to align with the 2026 *Criteria*.

## Clarification on VB-FH Course Options for Upgrading Appraisers **NEW!**

**Question:** Should appraisers planning to upgrade their credential in the future be advised to take the 8-hour VB-FH Course for QE now to avoid having to take the 7-hour VB-FH course for CE?





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**Answer:** While it is ultimately up to the appraiser, state agencies may wish to clarify that planning could help appraisers avoid unnecessary duplication. The 7-hour VB-FH Course is designed to fulfill CE requirements, while the 8-hour VB-FH Course version, which includes a 1-hour exam, is required to satisfy QE requirements for credential upgrades.

If an appraiser takes the 7-hour VB-FH CE version now, they will meet their CE requirement but will still be required to complete the 8-hour VB-FH QE version to upgrade their credential, subject to the foregoing exception. To prevent this scenario, appraisers can be encouraged to complete the 8-hour VB-FH QE version in advance. This Course satisfies both QE and CE requirements, ensuring the appraiser is prepared for future upgrades without needing to retake the course in a different format.

State agencies may want to communicate this option to appraisers, emphasizing that, while they are free to complete the 7-hour VB-FH CE course now and the 8-hour VB-FH QE course later, completing the 8-hour VB-FH version upfront optimizes the process for those considering an upgrade in the future.



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**Issue Date:** July 18, 2024

## Previously Issued Q&As:

The following Q&As were previously issued by the AQB but have been compiled here for the convenience of state regulators:

### Can a CE version of the course count as QE?

**NOTE:** *This Q&A was updated on March 19, 2025*

**Question:** What happens when individuals who currently have a credential take a course that meets the valuation bias and fair housing laws and regulations outline (VB-FH) for the 7-Hour course for Continuing Education (CE), and then they later upgrade? Do they then have to take the 8-hour VBFH course (7 hour plus exam), just the exam, or are they considered grandfathered (with respect to the exam) because they held a credential at the time the new requirement was implemented?

**Answer:** CE credit hours cannot be used to satisfy Qualifying Education (QE) requirements, with the following exception. If an individual seeking to upgrade their credential took a VB-FH 7-hour CE course during their most recent CE cycle, a state may recognize the CE course as meeting the QE requirement only if the student takes and passes the 1-hour exam from the same education provider that administered the CE course. This ensures that the course content and exam remain consistent and aligned with the approved curriculum.

It is important to note that both the CE and QE VB-FH courses must be currently approved by the state to qualify for this exception.

### Can the course include relevant state-specific content?

**Question:** If a course that is intended to meet the Real Property Qualification Criteria's outline for valuation bias and fair housing laws and regulations also includes relevant state-specific course materials on this topic, is the course eligible for QE or CE approval via the Appraisal Foundation's Course Approval Program (CAP)?

**Answer:** The outline for a course on valuation bias and fair housing laws and regulations in the 2026 Criteria requires education developers to follow the complete outline when developing this course, which includes the federal fair housing and antidiscrimination laws and regulations topic. As stated, the requirement for the sections of the course that cover laws and regulations is that the course addresses federal fair housing and antidiscrimination laws and regulations.

The AQB understands there might be instances where some minor content in the course may refer to or be an example of a state-specific law or regulation. Since CAP approves courses for all states and



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territories, it cannot approve a course with material applicable only to an individual state.

Therefore, a Valuation Bias and Fair Housing Laws and Regulations course submitted for CAP approval must strictly adhere to the outlined criteria and cover only the specified content. Minor references to state-specific issues may be acceptable as examples, but the primary focus must remain on federal fair housing and antidiscrimination laws and regulations.

## Course Completion Date

**Question:** My state has approved the 7-hour VB-FH course for both qualifying education (QE) and continuing education (CE) before the requirement to take the course goes into effect on January 1, 2026. If I take the course before that date, can that course count towards meeting that requirement when it becomes effective?

**Answer:** Yes. Based on the Criteria, any approved 7-hour course, plus a 1-hour exam for QE, or the 7-hour course for CE, successfully completed before the requirement goes into effect, meets the January 1, 2026, requirement. If you take an approved course at any time before it is required, then on January 1, 2026, you have satisfied the requirement to take the 7-hour course. If the state didn't approve the course, it won't fulfill the requirement, as is true for any other course.

Then, every two calendar years thereafter, (and each CE cycle thereafter), you will need to take an approved version of the course that is at least 4 hours in length.

However, check with your state for any additional requirements.

## 7-hour version

**Question:** Do I need to take an exam if I take the 7-hour version of the course for continuing education (CE)?

**Answer:** You only need to take the 1-hour exam if you are using the 7-hour course to meet your Qualifying Education requirements.

# Concept Paper: Generative AI and Appraisal Standards – A Call for Stakeholder Input

An Appraisal Standards Board's Concept Paper  
April 1, 2025



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# Welcome

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We invite all stakeholders to participate in a crucial discussion regarding a matter of significant importance in our field: ***The Appraisal Standards Board (ASB) is seeking your feedback on the concept of developing guidance for utilizing Generative Artificial Intelligence (Generative AI) in appraisal practice.*** Generative AI tools create new text by predicting the most likely output in response to a given input. These tools achieve this by processing extensive datasets from online and/or proprietary sources. Some Generative AI tools are considered “self-improving,” as they adapt and refine their functionality through ongoing exposure to additional information. In appraisal practice, just as spreadsheet programs revolutionized the way appraisers calculate and organize data, Generative AI is emerging as a resource for handling common appraisal-related development and communication tasks. This effort requires our full commitment to understanding the nuances of this issue before reaching any potential conclusions.

We urge you to join us in this important endeavor by reading this Concept Paper so that you can prepare and provide your feedback and insights. In the following pages, you will find a brief background, followed by points to consider as you prepare your feedback, and a series of questions we would like you to reflect on.

Your participation at this early stage is essential, and we sincerely appreciate any feedback you choose to share with us as we explore this topic.

If you have any questions, please contact the Board at [ASB@appraisalfoundation.org](mailto:ASB@appraisalfoundation.org).

Nicholas D. Pilz  
Chair, Appraisal Standards Board

## Join the Conversation

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The Appraisal Standards Board (ASB) will host a Public Meeting on April 23, 2025, from 1:00 pm ET. The Board will use this time to discuss the concept paper. Register [here](#) to attend the Public Meeting.

All interested parties are encouraged to comment in writing to the ASB before the deadline of **May 31, 2025**. Each member of the ASB will thoroughly read and consider all comments.

## Send Your Comments by May 31, 2025

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To submit your responses to question and comments, please visit:  
<https://www.surveymonkey.com/r/ASBComments>.

While 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](mailto:ASB@appraisalfoundation.org).

# Background

---

USPAP was developed in 1986–87 to establish a single set of nationally recognized minimum appraisal standards, replacing the varying standards previously maintained by individual appraiser membership organizations. This effort aimed to enhance public trust in appraisal practice by ensuring consistency, reliability, and clarity, thereby addressing the confusion and potential conflicts that arose from differing standards. While the mission of USPAP remains the same, it has evolved to address changes in markets, technology, and the appraisal profession. To uphold this mission, the Appraisal Standards Board (ASB) continually reviews and updates USPAP, guided by feedback and suggestions from appraisers and stakeholders.

In response to public questions regarding the use of artificial intelligence in appraisal assignments, particularly Generative AI tools, the ASB issued a Q&A in January 2024 (click [here](#) to view this document). The Q&A addresses how AI tools can be integrated into appraisal practice while maintaining compliance with USPAP. The ASB clarified that although AI tools, including Generative AI, can assist with data analysis and communication of assignment results, it cannot replace an appraiser’s judgment. As such, appraisers remain responsible for confirming that AI-generated outputs result in credible assignment results and comply with USPAP’s ETHICS and COMPETENCY RULES, particularly in safeguarding confidentiality and avoiding reliance on potentially biased or inaccurate AI outputs.

To seek stakeholder feedback on this topic, the ASB hosted a virtual public forum on September 12, 2024, titled **Artificial Intelligence and USPAP: Shaping Future Standards and Ethics Forum**. This forum brought together experts with various niches of expertise on artificial intelligence to discuss the implications of AI on appraisal practice. The goal was to inform both the ASB and the public on these evolving issues and determine the next course of action. A recording of the forum is available on the Appraisal Foundation’s YouTube channel for those interested in reviewing the discussion [here](#).

The ASB has carefully evaluated the application of Generative AI tools in appraisal practice within the framework of existing USPAP requirements and continues to monitor developments in this area. This document identifies current USPAP requirements the ASB considers relevant to AI, to assist appraisers and stakeholders in understanding how these standards apply. The ASB is seeking public feedback to identify if there are potential gaps and to suggest topics for further guidance. While this document specifically references Generative AI, stakeholders are encouraged to consider the broader implications of Artificial Intelligence, including tools that support or affect appraisal-related analyses, conclusions, or processes.



# Questions for You on Existing Guidance

---

Each stakeholder has a unique perspective on the application of Generative AI in appraisal practice. While not all stakeholders are appraisers, their insights remain valuable. The ASB welcomes feedback from all interested parties.

To encourage broad participation, we begin with general questions allowing all interested respondents to express concerns and perspectives on the role of Generative AI in appraisal practice. While some of the questions are worded in a way that would resonate more with specific stakeholders, respondents can choose to answer any one or more of the questions, regardless of their stakeholder group (e.g., appraisers, regulators, users of appraisal services).

Immediately following the questions are explanations of how USPAP addresses this topic, and other facts and information.

## GENERAL QUESTION FOR ALL STAKEHOLDERS

- Do you believe additional guidance on the use of Generative AI in appraisal practice is needed at this time?
- What concerns do you have about the use of Generative AI in appraisal practice and its impact on public trust?
- Are there gaps in existing USPAP requirements and/or guidance that should be addressed to clarify the use of Generative AI in appraisal practice?
- Should Advisory Opinion 37 (Computer Assisted Valuation Tools) be revised to address Generative AI, replaced entirely, or kept as is with separate guidance developed to specifically address Artificial Intelligence tools, including those that incorporate automated processes that may inform or shape appraisal-related tasks?

## FOR APPRAISERS

- How is Generative AI currently being used, or being considered for use, in your appraisal practice, and what challenges do you face in maintaining compliance with USPAP?

## FOR REGULATORS AND FINANCIAL INSTITUTIONS

- What challenges do regulators encounter in overseeing the use of Generative AI in appraisals?

## ALL USERS OF APPRAISAL SERVICES

- How do you see Generative AI being used (or considered for use) in appraisals, and what concerns do you have regarding its impact on reliability and decision-making?

## Existing USPAP Requirements

---

The integration of Generative AI in appraisal practice raises important questions about how appraisers can maintain compliance with established standards while leveraging new technologies. While Generative AI tools have the potential to enhance efficiency and support analytical processes, their integration into the appraisal process must align with the foundational principles of USPAP. This section outlines existing USPAP requirements that relate to Generative AI, providing a foundation for discussion on whether additional requirements or guidance may be necessary.

Below is an overview of current USPAP requirements and how these requirements address Generative AI tools in appraisal practice.

### ETHICS RULE

The ETHICS RULE sets forth the requirements for integrity, impartiality, objectivity, independent judgment, and ethical conduct. The Conduct and Confidentiality sections are particularly relevant to this discussion and are examined in greater detail below.

#### Conduct Section

Generative AI tools often acknowledge their potential for producing errors. Without exercising independent judgment or verifying accuracy, reliance on a Generative AI tool's output could result in misleading outcomes. As such, an appraiser who relies solely on the output of a Generative AI tool risks violating the Conduct section of the ETHICS RULE.

The following excerpt from the Conduct section of the ETHICS RULE highlights the requirements particularly relevant to this discussion:

- *An appraiser must perform assignments with impartiality, objectivity, and independence, and without accommodation of personal interests.*
  - *An appraiser... must not communicate assignment results with the intent to mislead or to defraud;*
  - *An appraiser... must not perform an assignment in a grossly negligent manner.*

## Confidentiality Section

Appraisers using Generative AI must maintain compliance with the Confidentiality section of the ETHICS RULE by safeguarding all confidential information. Before inputting sensitive client data into a Generative AI tool, appraisers must evaluate the tool's data security measures, terms of use, and potential risks of unauthorized access or disclosure. If the Generative AI tool operates on external servers or retains inputs for training, there is a heightened risk of exposure. Appraisers should assess these risks and comply with all applicable confidentiality requirements, ensuring they do not inadvertently disclose confidential information. Additionally, appraisers are responsible for confirming that the tool does not inadvertently share confidential information across assignments, potentially breaching client confidentiality. Ultimately, the appraiser is responsible for taking reasonable measures to protect client information while using Generative AI in compliance with the Confidentiality section of the ETHICS RULE.

The following excerpt from the Confidentiality section of the ETHICS RULE highlights the requirements particularly relevant to this discussion:

- *An appraiser must act in good faith with regard to the legitimate interests of the client in the use of confidential information and in the communication of assignment results.*
- *An appraiser must be aware of, and comply with, all confidentiality and privacy laws and regulations applicable in an assignment.*
- *An appraiser must take reasonable steps to safeguard access to confidential information and assignment results by unauthorized individuals, whether such information or results are in physical or electronic form.*

## RECORD KEEPING RULE

The RECORD KEEPING RULE establishes the workfile requirements for appraisal and appraisal review assignments. If Generative AI is used as part of developing an appraisal or writing an appraisal report, the appraiser is responsible for maintaining records in compliance with USPAP. This includes ensuring that all relevant documentation is properly retained in the workfile. Because Generative AI outputs may not be replicable, merely referencing the use of Generative AI may not meet USPAP's record-keeping requirements. Appraisers must be competent in the tools they use and are responsible for ensuring that any AI-generated output relied upon is properly documented in compliance with USPAP.

The following excerpt from the RECORD KEEPING RULE highlights the requirements particularly relevant to this discussion:

- *true copies of all written reports, documented on any type of media...*

- ... all other data, information, and documentation necessary to support the appraiser’s opinions and conclusions and to show compliance with USPAP, or references to the location(s) of such other data, information, and documentation.

## COMPETENCY RULE

The COMPETENCY RULE presents pre-assignment and assignment conditions for knowledge and experience. While Generative AI tools can assist an appraiser, they cannot serve as a substitute for an appraiser's professional judgment. Ultimately, it is the appraiser’s responsibility to apply their judgment to clearly and accurately set forth the appraisal in a manner that will not be misleading. Appraisers need to understand the capabilities, limitations, and potential risks associated with Generative AI tools they use. The appraiser needs to verify the accuracy and reliability of the Generative AI outputs before incorporating them into the appraisal or appraisal report.

Excerpts from the COMPETENCY RULE highlight key requirements and guidance related to appraiser competency, including a comment from the *Being Competent* section that provides further clarification on factors affecting competency:

*An appraiser must... (1) be competent to perform the assignment; (2) acquire the necessary competency to perform the assignment; or (3) decline or withdraw from the assignment. In all cases, the appraiser must perform competently when completing the assignment.*

*Perfection is impossible to attain, and competence does not require perfection. However, an appraiser must not render appraisal services in a careless or negligent manner. This Rule requires an appraiser to use due diligence and due care.*

Additionally, the Comment from the “Being Competent” section of the ETHICS RULE:

Comment: *Competency may apply to factors such as, but not limited to, an appraiser’s familiarity with a specific type of property or asset, a market, a geographic area, an intended use, specific laws and regulations, or an analytical method. If such a factor is necessary for an appraiser to develop credible assignment results, the appraiser is responsible for having the competency to address that factor or for following the steps outlined below to satisfy this COMPETENCY RULE.*

## SCOPE OF WORK RULE

The SCOPE OF WORK RULE presents obligations related to problem identification, research, and analyses. Limitations or risks associated with the use of Generative AI, such as, for example, potential inaccuracies, hallucinations, or incomplete data, may be considered and addressed as part of the appraiser’s scope of work. The appraiser is responsible for the assignment results, even when Generative AI is utilized, confirming the scope of work meets or exceeds the expectations of parties who are regularly

intended users for similar assignments and what an appraiser’s peers would be in the same or similar assignment.

The following excerpt from the SCOPE OF WORK RULE highlights the requirements particularly relevant to this discussion:

*For each appraisal and appraisal review assignment, an appraiser must:*

- 1. identify the problem to be solved;*
- 2. determine and perform the scope of work necessary to develop credible assignment results; and*
- 3. disclose the scope of work in the report.*

*The scope of work must include the research and analyses that are necessary to develop credible assignment results.*

*Comment:* *The scope of work is acceptable when it meets or exceeds:*

- *the expectations of parties who are regularly intended users for similar assignments; and*
- *what an appraiser’s peers’ actions would be in performing the same or a similar assignment.*

*The report must contain sufficient information to allow the client and other intended users to understand the scope of work performed. The information disclosed must be appropriate for the intended use of the assignment results.*

## STANDARDS

The STANDARDS establish the requirements for appraisal and appraisal review and the manner in which each is communicated. The STANDARDS are clear that it is the responsibility of the appraiser and not a tool the appraiser uses to “... *correctly complete research and analyses necessary to produce a credible appraisal*”<sup>1</sup> and “... *communicate each analysis, opinion, and conclusion in a manner that is not misleading.*”<sup>2</sup>

The STANDARDS each contain overarching requirements addressing the appraiser’s obligations.

For example, STANDARD 1 states that in developing a real property appraisal, an appraiser must:

- (a) be aware of, understand, and correctly employ those recognized methods and techniques that are necessary to produce a credible appraisal...*
- (b) not commit a substantial error of omission or commission that significantly affects an appraisal...*

<sup>1</sup> For example, see Standard 1 (lines 491-493).

<sup>2</sup> For example, see Standard 2 (lines 630-631).

*(c) not render appraisal services in a careless or negligent manner, such as by making a series of errors that, although individually might not significantly affect the results of an appraisal, in the aggregate affects the credibility of those results...*

For example, STANDARD 2 states that in reporting a written or oral real property appraisal, each report must:

- (a) clearly and accurately set forth the appraisal in a manner that will not be misleading...*
- (b) contain sufficient information to enable the intended user(s) of the appraisal to understand the report properly...*
- (c) clearly and accurately disclose all assumptions, extraordinary assumptions, hypothetical conditions, and limiting conditions used in the assignment...*

## Existing Guidance

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Guidance can be issued as Questions and Answers (Q&As), Frequently Asked Questions (FAQs), or Advisory Opinions (AOs). Guidance issued by the Appraisal Standards Board does not establish new standards or interpret existing standards. In addition to the noted Q&A above, other guidance can be found in Advisory Opinion 18, *Use of an Automated Valuation Model (AVM)* and Advisory Opinion 37, *Computer Assisted Valuation Tools* in the Guidance and Reference Manual (GRM). However, the ASB recognizes that these Advisory Opinions were issued prior to the existence of the Generative AI tools. As such, this measure of public outreach remains in focus to ensure proper application of USPAP with the overall objective of maintaining public trust in appraisal practice.

## Feedback

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Written comments on this concept paper can be submitted by mail and email. Please submit your comments by Monday, May 31, 2025.

Respondents should be assured that each member of the ASB will thoroughly read and consider all comments. Comments are also welcome at the public meeting on April 23<sup>rd</sup>, 2025.

Please note that no specific changes to USPAP or guidance are being proposed at this time.

Mail: Appraisal Standards Board

The Appraisal Foundation  
1155 15<sup>th</sup> Street, NW, Suite 1111  
Washington, DC 20005

Email: [ASB@appraisalfoundation.org](mailto:ASB@appraisalfoundation.org)

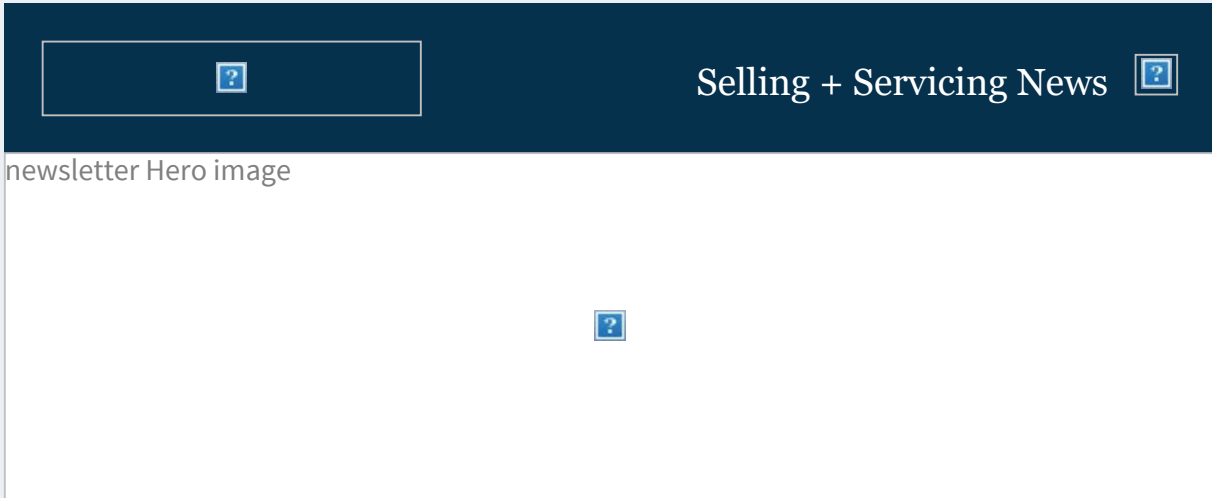
**IMPORTANT NOTE: All written comments will be posted for public viewing on The Appraisal Foundation’s website exactly as submitted to the ASB. Names may be redacted upon request.**

**The Appraisal Foundation reserves the right not to post written comments that contain offensive or inappropriate statements.**

**From:** [Fannie Mae Selling + Servicing News](#)  
**To:** [Kohtz, Tyler](#)  
**Subject:** DU Condo Project Status Certainty, Loan Pricing API, and More  
**Date:** Wednesday, March 19, 2025 10:01:05 AM

You don't often get email from fanniemae\_info@fanniemae.com. [Learn why this is important](#)

[View As Webpage](#)



March 19, 2025

## Featured News

### **DU update will provide enhanced condo project status certainty**

Desktop Underwriter® (DU®) will be updated to provide condo project status and eligibility information from Condo Project Manager™ (CPM™) in the DU Underwriting Findings report for new loan casefiles created on or after June 23. This provides greater certainty in many instances when projects have been approved by Fannie Mae and can help streamline underwriting processes. Other updates that apply to loan casefiles submitted or resubmitted on or after May 17 include changes related to value acceptance, messaging when refinancing Fannie Mae loans, updates to align with the *Selling Guide*, and more.

[Read the Release Notes](#)

[See the integration impact memo](#)





## Access real-time pricing with the Loan Pricing API

Fannie Mae's Loan Pricing API helps lenders quickly get real-time pricing for loans without having to manually check or enter data – making the loan pricing process faster and more efficient. Contact your sales engineer or Fannie Mae representative to get started.

[Learn More](#)

## Selling News

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### Changes to AQM list format

Beginning March 27, we're changing the format of the Appraiser Quality Monitoring (AQM) list. The information will be organized into tabs, including a summary tab highlighting recent changes. The list is available on Fannie Mae Connect™.

[Learn about Fannie Mae Connect](#)

[Visit the Appraiser Quality Monitoring page](#)

## Servicing News

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### Introduction to servicing eLearning series

For staff who are new to servicing Fannie Mae loans or would like to refresh their knowledge, our self-paced eLearning series provides an overview of the *Servicing Guide*, our systems, investor accounting, and much more.

[View the Introduction to Servicing eLearning](#)

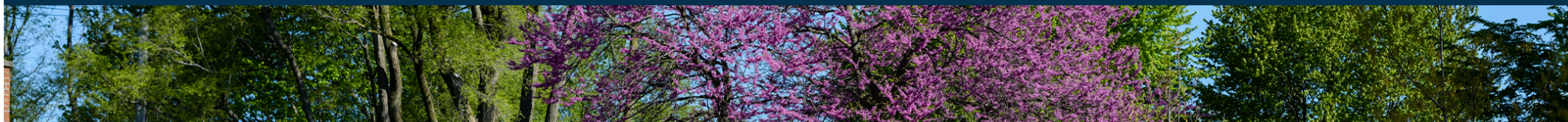
[Visit the Servicing Learning Center](#)



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[Home](#) / [Originating & Underwriting](#) / [Appraisers](#) / **Appraiser Update**

Originating & Underwriting

## Appraiser Update

### Periodic updates for residential appraisers serving Fannie Mae customers

Welcome to our Q1 2025 Fannie Mae Appraiser Update.

Since the announcement that we are updating the Uniform Appraisal Dataset (UAD), appraisers have been asking for a preview of what the new report will look like. In this edition we share how appraisers can get a first look along with some other important information about implementation of UAD 3.6.

We also provide guidance on how to determine condition, quality, location, and view ratings, as well as an overview of our new definitions of floor plan and sketch.

Another article unpacks a December update to the Fannie Mae *Selling Guide* regarding market change (time) adjustments.

As always, we invite you to share what's on your mind, submit feedback, or ask questions about appraisal topics using the link at the bottom of this newsletter.

Collateral Policy Team  
Fannie Mae

### The Future of Residential Appraisals: A First Look at the New URAR

Soon the mortgage industry will migrate to the new Uniform Residential Appraisal Report (URAR) and the updated Uniform Appraisal Dataset (UAD 3.6). This is an pivotal time in our appraisal modernization journey.

#### In this issue

[The Future of Residential Appraisals: A First Look at the New URAR](#)

[Definitions of Footprint Sketch and Floor Plan](#)

[Absolute vs. Relative Ratings](#)

[Market Condition \(Time\) Adjustments](#)

#### Related links

[Newsletter archive](#)



Interested in receiving this newsletter and other periodic appraisal-related updates?

[Sign up now!](#)

The most significant change is the retirement of the legacy appraisal forms and form numbers. Yes, you heard correctly! No more forms or form numbers. Going forward, there will be one dynamic URAR for all residential property types, including single family, 2- to 4- unit, condo, manufactured, and co-op. The new process will accommodate traditional, exterior only, desktops, and hybrids appraisal assignments when applicable. Even those additional client requests, such as limited marketing or exposure time values, cost to repair, and government agency requirements are now part of this single reporting process.

The best part is the adaptive nature of the report. Conditionality drives what sections and information appear in the final output, eliminating the need for multiple forms. The final report will only display what is relevant to your appraisal assignment and show the actions you have taken to develop the appraisal. The result will be a uniquely designed report for each subject property that best communicates its characteristics, and the work performed.

### URAR Sneak Peek

Since this reporting structure is brand new, we received questions from appraisers asking to see it or practice using it. While appraisal software vendors are not quite ready for their big reveals, we do have a way for appraisers to see how the finished appraisal report will look.

Recognizing no two reports will look the same, Fannie Mae has published sample appraisals to illustrate various possibilities. We encourage appraisers to go to Fannie Mae's UAD webpage and view all twelve sample reports found in Appendix D-1 to get a general idea of what to expect.

## UAD Documentation

The following UAD resources provide the actionable documentation needed to translate the data entered on the report into the format required for submission via the UCDP.

### Uniform Residential Appraisal Report

### Restricted Appraisal Update Report

### Completion Report

#### Appendix A-1: URAR Delivery Specification

This document contains the UAD dataset and XML mapping based on MISMO v3.6. It includes all the details necessary to create a well-formed XML file in accordance with MISMO v3.6.

#### Appendix B-1: URAR Implementation Guide

This zip file contains the Implementation Guide and its supplements. The Implementation Guide assists software vendors with data mapping, field formats, and the display logic for the PDF representation of the report. The supplements help identify details related to the Comparable Grids and provide guidance for creating the user interface.

#### Appendix C-1: URAR Layout

This zip file contains the URAR with Report Field IDs document and the URAR without Report Field IDs document. The purpose of these documents is to show all possible Report Labels that may display on the URAR, regardless of conditionality.

#### Appendix D-1: URAR Sample Scenarios and XML Files

This zip file contains example scenarios, accompanying XMLs, and a document that summarizes the scenarios, including key characteristics and changes since the last published version.

#### Appendix E: Report Style Guide

This zip file contains the Report Style Guide and its supplements. The Report Style Guide describes the design and layout of the reports. It includes specifications for the sizes and positioning of all elements that could appear in the reports. The supplements are sample reports with design elements noted.

#### Appendix F-1: URAR Reference Guide

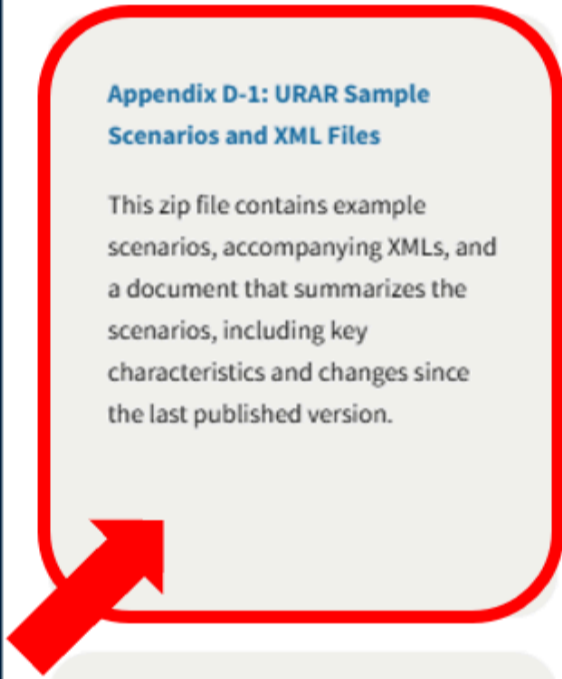
This zip file contains the URAR Reference Guide and its supplement. The Reference Guide provides guidance on how to enter information and how the data will be displayed in the URAR. The supplement summarizes information about the Comparable Grids.

#### Appendix G-1: Redesign to Legacy UAD Cross Reference Guide

This document contains the data points, enumerations, and xPaths of the redesigned UAD mapped to existing data elements in the Legacy UAD dataset.

#### Appendix H-1: UAD Compliance Rules-URAR

This document contains rules to help lenders and vendors deliver the XML in compliance with the UAD Delivery Specification. These rules verify data completeness, validity (format and data type), and reasonableness.



# Uniform Residential Appraisal Report

123 ANYWHERE ST, SOMECITY, TN 12345

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## SUMMARY

Opinion of Market Value	\$275,000	Market Value Condition	As Is
Effective Date of Appraisal	03/14/2022	Property Valuation Method	Traditional Appraisal
Assignment Reason	Refinance	Appraiser Name	Annie Appraiser
Borrower Name	John Doe		
Current Owner of Public Record	Jane Doe		
Listing Status	None	Overall Quality	Q3
		Overall Condition	C2

---

Property Description	Manufactured				
Construction Method	Site Built				
Attachment Type	Detached	Yes	No		
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		

---

Planned Unit Development (PUD)			
Condominium			
Cooperative			
Condop			
Subject Site Owned in Common	1		
Units Excluding ADUs	0		
Accessory Dwelling Units	Fee Simple	Yes	No
Property Rights Appraised		<input checked="" type="checkbox"/>	<input type="checkbox"/>

---

Is the highest and best use of the subject property as improved (or as proposed per plans and specifications) the present use?

Zoning Compliance Legal

HUD Data Plate Attached Yes


HUD Label Present for All Sections Yes

---

**Apparent Defects, Damages, Deficiencies Requiring Action**

None

---



## View URAR Sample Scenarios

1. Go to the [UAD webpage](#).
2. Scroll down to the UAD Documentation section.
3. Select [Appendix D-1: URAR Sample Scenarios and XML Files](#).  
Note: This will start the download process.
4. Once downloaded, open the zip file folder and select a sample scenario from the list.  
Note: Appraisers will want to view the PDF version.

Also available in the file folder is the **D-1 URAR Sample Scenario Matrix**. Use this spreadsheet to quickly identify key characteristic of each scenario. For example, Single Family 3 (SF3) has an ADU in an outbuilding, while Single Family 4 (SF4) has an ADU in the basement of the primary dwelling. Condo1 is a sample of a hybrid appraisal while Condo2 is a desktop appraisal, and so on.

Single Family Scenario 5 (SF5) is the best representation of how a typical straight-forward appraisal assignment will display in the new URAR. Keep in mind, each sample scenario was thoughtfully crafted to display as many different appraisal variations as possible to give appraisers and users of appraisal reports the full spectrum of reporting capabilities.

As you begin to prepare, we ask that you take the time to review each sample scenario. Given your experience as an appraiser, we think these visual aids will help provide greater context into the coming changes. The sample appraisal reports are intended to illustrate how the new reports display information and demonstrate the diversity of fields available for appraisers to use.

## Countdown to the New URAR

Now you're probably asking: how much time do I have? Review the upcoming milestones below and [view the detailed timeline](#) for more information:

- Sept. 8, 2025: Limited Production Period begins
- Jan. 26, 2026: Broad Product Period begins
- Nov. 2, 2026: Mandate – all lenders must use UAD 3.6 for all new submissions
- May 3, 2027: Retirement of UAD 2.6



Fannie Mae



### UNIFORM MORTGAGE DATA PROGRAM

2024		2025		2026		2027
UAD 3.6 TESTING		Uniform Appraisal Dataset (UAD) 3.6 PRODUCTION				
INDUSTRY PREP		LIMITED PRODUCTION September 8, 2025 – January 25, 2026		BROAD PRODUCTION January 26, 2026 – November 1, 2026		MANDATE November 2, 2026
		UAD 2.6 -> UAD 3.6 Transition Period			UAD 2.6 Pipeline Revisions	
Submit 2.6 Only  <b>November 18, 2024</b> – Redesignated Uniform Residential Appraisal Report (URAR) industry training available on GSE websites	Submit 2.6 Only  <b>June 4, 2025</b> – GSEs publish policy updates  <b>July 28, 2025</b> – ULDD Mandate: Lenders must deliver ULDD Phase 5 data points prior to using UAD 3.6	Submit 2.6 and Limited Production Participants* to Submit 3.6  <b>September 8, 2025</b> – Fannie Mae and Freddie Mac can accept both UAD 2.6 and 3.6  *Limited Production Participants - Lenders who have submitted the UAD Questionnaire and received GSE approval will have controlled access to submit 3.6 to Uniform Collateral Data Portal (UCDP)		Submit 2.6 or Submit 3.6  <b>January 26, 2026</b> – All Lenders may begin submitting to the GSEs' production environment without prior GSE approval		Submit 3.6 Only  <b>November 2, 2026</b> – Lenders must use UAD 3.6 for all new submissions on or after this date  Revisions allowed for previously submitted UAD 2.6 appraisals
						2.6 Pipeline Cleared  <b>May 3, 2027</b> – UAD 2.6 Pipeline revisions period ends

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12/9/2024

The UAD webpage includes a detailed implementation timeline.

## Definitions of Sketch and Floor Plan

In February, we added the definitions of *footprint sketch* and *floor plan* to the Selling Guide [glossary](#):

### Footprint sketch

A footprint sketch must be software-generated (not hand drawn) and include the following:

- all exterior wall dimensions,
- all levels of the dwelling, and
- the calculations that demonstrate how the square footage(s) was derived.

A separate footprint sketch including all exterior dimensions and room labels must be provided for each additional structure.

### Floor plan

A floor plan must be software-generated (not hand drawn), show the exterior footprint and interior layout of the dwelling unit(s) and include the following:

- all exterior wall dimensions,
- all interior walls, doorways, staircases, exterior ingress/egress, and labels for each room,
- all levels of the dwelling, and
- the calculations that demonstrate how the square footage(s) was derived.

We require a floor plan for all property data collections, hybrid appraisals, and desktop appraisals. If the layout of the dwelling unit(s) is atypical or functionally obsolete, we also require a floor plan for traditional appraisals. Otherwise, a footprint sketch is acceptable for traditional appraisals. For more information about when to provide a floor plan versus a sketch, see [Selling Guide B4-1.2-01, Appraisal Report Forms and Exhibits](#).

## Absolute vs. Relative Ratings

Our Appraiser Quality Monitoring (AQM) team routinely finds cases of appraisers smoothing their quality or condition ratings. An example would be when the appraiser rates the quality of all subject properties Q3, indiscriminately. In fact, we sent educational letters to more than 200 appraisers in 2024 (and 59 already in 2025) for this issue. It undermines the credibility of the appraiser and, if uncorrected, could lead to more serious consequences. This behavior may be evidence that the appraiser has determined property ratings on a relative basis rather than absolute. [Selling Guide section B4-1.3-06, Property Condition and Quality of Construction states:](#)

*“When selecting the condition and quality ratings, an appraiser must ... describe the subject property ... on an absolute basis, meaning the property must be rated on its own merits. The rating should not be selected on a relative basis, meaning it is not selected on how the property relates or compares to other properties in the neighborhood. Additionally, the condition and quality ratings for comparable properties must be made on an absolute basis ... These requirements also apply to all other ratings or descriptions, including the View and Location.”*

To understand what we mean by “an absolute basis,” it may help to consider these common definitions (from [Oxford Languages](#)) of absolute:

- (adjective) viewed or existing independently and not in relation to other things; not relative or comparative
- (noun) a value or principle which is regarded as universally valid or which may be viewed without relation to other things

When determining the ratings, the appraiser must not take into consideration comparisons to other properties nor the characteristics of the neighborhood or market area. The only consideration is how the property characteristics align with our [rating definitions](#).

One important outcome of correctly applying these policies is that, once the appraiser has rated a particular property, it will naturally continue to have the same rating throughout all reports. Thus, the ratings determined by the appraiser when appraising a subject property for a purchase will remain the same if that property is subsequently used as a comparable.

These same principles apply to View and Location ratings. For example, if a subject property is adjacent to a busy street, its location rating must be adverse. Comparables with similar traffic influence would also be rated adverse. It would not be correct for the appraiser to rate them all Neutral because that would be a relative rating rather than absolute.

Determining ratings on an absolute basis may be challenging for some appraisers because the principal approach to value for residential properties is the sales comparison approach which requires appraisers to consider the relative merits of the subject and the comparables. The key is for the appraiser to first determine the ratings on an absolute basis, then to determine the adjustments on a relative basis.

## Market Condition (Time) Adjustments

In a recent internal analysis of appraisals with aged comparables performed during times of rapid home price appreciation (suggesting the need for time adjustments), we found that most comparables were not adjusted for time. When we asked appraisers why not, a common response is that their lender clients discourage time adjustments.

With that in mind, in December 2024 we added two provisions to the Selling Guide in relation to time adjustments.

First, we specified that “Failure to make market-derived adjustments including time adjustments when they are clearly indicated” is an unacceptable appraisal practice ([Selling Guide section B4-1.1-04 Unacceptable Appraisal Practices](#)). Our aim is to convey to lenders that they should expect and encourage time adjustments. This also gives appraisers a succinct, tangible policy statement that may help them defend the decision to make a time adjustment.

Market condition is always the norm and that analysis may require an adjustment. The next question is how to determine the rate of adjustment. There are many acceptable professional appraisal methodologies. We added this statement to illustrate the wide range of techniques available to appraisers:

“Time adjustments, or the lack thereof, must be supported by evidence. Use of home price indices (HPIs) to support time adjustments is consistent with our policy. The adjustment rates can also be determined through statistical analysis, modeling, paired sales, or other commonly accepted methods. The appraisal report must, at a minimum, summarize the supporting evidence and include a description of the data sources, tool(s), and technique(s) used.” ([Selling Guide B4-1.3-09, Adjustment to Comparable Sales](#).)

**This policy obligates the appraiser to provide support for the lack of a time adjustment:**

- **Stating that an adjustment was or was not made is not enough.**
- **The expectation is that the appraiser will always analyze market conditions to determine if time adjustments are needed and will always disclose how the determination to adjust or not adjust was made, and at what rate.**

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