

MINUTES
ALABAMA REAL ESTATE APPRAISERS BOARD
RSA UNION STREET
SUITE 370
MONTGOMERY, ALABAMA
March 18, 2021

MEMBERS PRESENT:

Mr. Billy Cotter (Chairman)
Ms. Patrice McClammy (Vice-Chairman) joined at 9:24 a.m.
Mr. Richard D. Pettey
Mr. Drew Watson
Mr. Robert Butler
Mr. Mark Haller
Mr. Roger Ball
Mr. Chad Anderson joined at 9:07 a.m.

MEMBERS ABSENT:

Ms. Melanie Housh (confirmed March 16, 2021)

OTHERS PRESENT:

Mrs. Lisa Brooks, Executive Director
Ms. Neva Conway, Legal Counsel
Mrs. Carolyn Greene, Executive Secretary
Mrs. Margaret Anne Davis
Mr. Sam Davis

GUESTS PRESENT:

Ms. Melissa Bond, Certified Residential Appraiser/Instructor, Kiln, MS
Mr. Scott Helms, Certified General, Huntsville, AL
Mr. Lew Watson, Certified General, Lincoln, AL

- 1.0 Mr. Billy Cotter, Chairman, called the meeting to order at 9:00 a.m. Mrs. Carolyn Greene, Executive Secretary, recorded the minutes. The meeting was held via teleconference. Prior notice of the meeting was posted on the Secretary of State's website on March 9, 2021 in accordance with the Alabama Open Meetings Act.
- 2.0 The meeting was opened with prayer and the Pledge of Allegiance, led by Mr. Cotter.
- 3.0 Mr. Cotter asked Mrs. Greene to call a voice roll to establish a quorum. Members present were Mr. Billy Cotter, Mr. Richard D. Pettey, Mr. Roger Ball, Mr. Mark Haller, Mr. Robert Butler, and Mr. Drew Watson. A quorum was established. Mr. Chad Anderson, joined the meeting at 9:07 a.m. and Ms. Patrice McClammy joined the meeting at 9:24 a.m. Member absent was Ms. Melanie Housh.

Mrs. Brooks announced that Ms. Melanie Housh had been confirmed on March 16, 2021 as the Board member for the Third Congressional District, replacing Mr. Lew Watson. Mr. Lew Watson is therefore attending this meeting as a guest. Mr. Cotter and Mrs. Brooks thanked Mr. Watson for his dedication to the Board.

- 4.0 On motion by Mr. Ball and second by Mr. Butler, the regular minutes for January 21, 2020 were approved as written. Motion carried by unanimous vote.
- 5.0 Ms. Conway stated that there was no pending litigation for Alabama and nothing new to report on the Federal Trade Commission VS Louisiana Real Estate Appraisers Board or on the Dental Board VS Smile Direct Club.
- 6.0 Ms. Conway updated the Board on HB452, which Ms. McClammy is handling, and is sponsored by Representative Morris. Mrs. Brooks reported that the Bill has not come out of Committee yet.
- 7.0 On motion by Mr. Ball and second by Mr. Haller, the following applications were voted on as listed. Mr. Drew Watson abstained from the vote. Motion carried.
- 7.1 **Trainee Real Property Appraiser applications approved:** Casey Jordan Cleveland, Christine Coleman Davis, Gregory Dale Fanin, Brian Jaspán Richards, James Trey Seitz, and William Bradley Spurlin. **Applications deferred:** None. **Applications denied:** None.
- Trainee Real Property Appraiser Experience Logs for Review:** **Logs approved:** Nick Davis, Kevin Gilstrap, and Chelsea Sellers. **Logs deferred:** Thomas Kip Marbut and R. Jason Wright. **Logs denied:** None.
- 7.2 **State Registered Real Property Appraiser applications approved:** None. **Applications deferred:** None. **Applications denied:** None.
- 7.3 **Licensed Real Property Appraiser application approved:** None. **Applications deferred:** None. **Applications denied:** None.
- 7.4 **Certified Residential Real Property Appraiser applications approved:** Thomas Patrick Clark (Recip)(VA), Chad Merschman, and Daniel B. Whitten. **Applications deferred:** Nicholas Risner. **Applications denied:** None.

7.5 **Certified General Real Property Appraiser applications approved:** Thomas P. Clark (Recip)(VA), Christopher A. Farrell (Recip)(GA), Michael Friend (Recip)(TX), Matthew Gene Kimmel (Recip)(IN), Christopher R. Myers (Recip)(CA), William D. Palmer, III (Recip)(GA), Branton Still, and Lev Yagudayev (Recip)(NY). **Application deferred:** None. **Applications denied:** None.

7.6 **Mentor applications approved:** None. **Applications deferred:** Homer Tripp Baldwin and Beth Hoffman. **Applications denied:** None.

The Board discussed Ms. Beth Hoffman's mentor application.

Mr. Drew Watson discussed formalizing the work product review requirements for all application processes.

Mr. Anderson discussed the mentor approval process. Ms. Conway stated that the review would look at technical skills only. Mr. Anderson would like to have the Board consider rewriting the rule to consider character and fitness for Mentor status applicants. Ms. Conway stated that she would have to look to see how and if that could be brought into the mentor approval process as our current rule does not provide for that. Ms. Conway stated that there aren't any guidelines regarding Board member or Investigator conversations with a candidate relating to their appraisal practice.

8.0 Mr. Pettey presented the Finance report for February 2020-2021. Mr. Pettey stated that the Board was 42% into Fiscal Year 2021 and 28% into budget expenditures. Mr. Pettey stated that there were no negative trends that could not be reconciled at this time.

On motion by Mr. Drew Watson and second by Mr. Butler, the Board voted to approve the Finance Report. Motion carried by unanimous vote.

9.0 On motion by Mr. Ball and second by Mr. Haller, the following education courses and instructor recommendations were approved, deferred, or denied as indicated. Motion carried by unanimous vote.

APPRAISAL INSTITUTE – ALABAMA/MISSISSIPPI

New Application:

(CE) Aerial Inspections for Real Estate – 3 Hours – Classroom
(Instructor: Lamar H. Ellis)

Both Course and Instructor Approved

APPRAISAL INSTITUTE – CHICAGO

New Applications:

- (CE) 2020-2021 7-Hour Equivalent National USPAP Update Course – 7 Hours – Classroom
(Instructor: Thomas Kirby)
Both Course and Instructor Approved
- (CE) Valuation by Comparison: Residential Analysis and Logic – 7 Hours – Classroom
(Instructor: Woody Fincham)
Both Course and Instructor Approved
- (CE) Artificial Intelligence, AVMs and Blockchain: Implications for Valuation – 4 Hours – Classroom
(Instructor: Mark Linne)
Both Course and Instructor Approved
- (CE) Application and Interpretation of Simple Linear Regression – 14 Hours – Classroom
(Instructor: John Urubek)
Both Course and Instructor Approved
- (CE) Using Spreadsheet Programs in Real Estate Appraisals: The Basics Synchronous – 7 Hours – Online
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved
- (CE) Litigation Assignments for Residential Appraisers: Doing Expert Work on Atypical Cases – 4 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Review Case Studies - Residential – 15 Hours – Online
(Instructor: Stephanie Coleman)
Both Course and Instructor Approved
- (CE) 2020-2021 7-Hour Equivalent USPAP Update Course – 7 Hours – Online
(Instructor: Craig Harrington)
Both Course and Instructor Approved
- (CE) Advanced Land Valuation: Sound Solutions to Perplexing Problems – 7 Hours – Classroom
(Instructor: Brett W. Hall)
Both Course and Instructor Approved

- (CE) Advanced Spreadsheet Modeling for Valuation Applications – 14 Hours – Classroom
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved
- (CE) Appraisal of Manufactured Homes Featuring Next Generation Manufactured Homes – 8.5 Hours – Classroom
(Instructor: R. Scott Hartman)
Both Course and Instructor Approved
- (CE) Appraising Condominium, Co-Ops and PUDs – 7 Hours – Classroom
(Instructor: Maureen Sweeney)
Both Course and Instructor Approved
- (CE) Artificial Intelligence, AVMs and Blockchains: Implications for Valuation Synchronous – 4 Hours – Online
(Instructor: Mark Linne)
Both Course and Instructor Approved
- (CE) Business Practices and Ethics – 6 Hours – Online
(Instructor: Steven Shockley)
Both Course and Instructor Approved
- (CE) Case Studies in Appraising Green Residential Buildings – 7 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Complex Litigation Appraisal Case Studies Synchronous – 7 Hours – Online
(Instructor: Sandy Adomatis)
Both Course and Instructor Approved
- (CE) Condemnation Appraising: Principles & Applications – 21 Hours – Classroom
(Instructor: Dale Kleszynski)
Both Course and Instructor Approved
- (CE) Contract or Effective Rent: Finding the Real Rent – 4 Hours – Classroom
(Instructor: Thomas Hamilton)
Both Course and Instructor Approved
- (CE) Contract or Effective Rent: Finding the Real Rent - Synchronous – 4 Hours – Online
(Instructor: Thomas Hamilton)
Both Course and Instructor Approved

- (CE) Desktop Appraisals, Bifurcated and Hybrid and Evaluations – 7 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Evaluating Commercial Leases: The Tenant and the Terms Both Matter – 7 Hours – Classroom
(Instructor: Gary DeWeese)
Both Course and Instructor Approved
- (CE) FHA Appraising for Valuation Professionals: FHA Single Family Housing Appraisal Requirements – 7 Hours – Classroom
(Instructor: Mark Smeltzer)
Both Course and Instructor Approved
- (CE) Fundamentals of Separating Real, Personal Property and Intangible Business Assets – 14 Hours – Classroom
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved
- (CE) How Tenants Create or Destroy Value: Leasehold Valuation and Its Impact on Value – 7 Hours – Classroom
(Instructor: Gary DeWeese)
Both Course and Instructor Approved
- (CE) Ignorance Isn't Bliss: Understanding an Investigation by a State Regulatory Board or Agency – 4 Hours – Classroom
(Instructor: Craig Steinly)
Both Course and Instructor Approved
- (CE) Introduction to Green Buildings: Principles & Concepts – 7 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Litigation Appraising: Specialized Topics & Applications – 21.5 Hours – Classroom
(Instructor: Steven Roach)
Both Course and Instructor Approved
- (CE) Online Analyzing Operating Expenses – 7 Hours – Online
(Instructor: Ken Foltz)
Both Course and Instructor Approved
- (CE) Online Appraisal of Medical Office Buildings – 7 Hours – Online
(Instructor: Donald Sonneman)
Both Course and Instructor Approved

- (CE) Online Appraising Automobile Dealerships – 7 Hours – Online
(Instructor: Bradley Carter)
Both Course and Instructor Approved
- (CE) Online Appraising Condominiums, Co-Ops and PUDs – 7 Hours – Online
(Instructor: Maureen Sweeney)
Both Course and Instructor Approved
- (CE) Online Appraising Convenience Stores – 7 Hours – Online
(Instructor: Robert Bainbridge)
Both Course and Instructor Approved
- (CE) Online Business Practices and Ethics – 6 Hours – Online
(Instructor: Steven Shockley)
Both Course and Instructor Approved
- (CE) Online Case Studies in Appraising Green Commercial Buildings – 14 Hours – Online
(Instructor: Tracy Reiss)
Both Course and Instructor Approved
- (CE) Online Case Studies in Appraising Green Residential Buildings – 7 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Online Comparative Analysis – 7 Hours – Online
(Instructor: Alan Simmons)
Both Course and Instructor Approved
- (CE) Online Cool Tools: New Technology for Real Estate Appraisers – 7 Hours – Online
(Instructor: Richard Pugh)
Both Course and Instructor Approved
- (CE) Online Data Verification Methods – 5 Hours – Online
(Instructor: Alan Simmons)
Both Course and Instructor Approved
- (CE) Online Eminent Domain & Condemnation – 7 Hours – Online
(Instructor: John Underwood)
Both Course and Instructor Approved
- (CE) Online Excel Applications for Valuations – 8 Hours – Online
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved

- (CE) Online FHA Appraising: Principles and Procedures – 7 Hours – Online
(Instructor: Craig Harrington)
Both Course and Instructor Approved
- (CE) Online Forecasting Revenue – 7 Hours – Online
(Instructor: Ken Foltz)
Both Course and Instructor Approved
- (CE) Online Introduction to Green Buildings: Principles and Concepts – 7 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Online Rates and Ratios: Making Sense of GIMS, OARS, DCF – 7 Hours – Online
(Instructor: Kenneth Lusht)
Both Course and Instructor Approved
- (CE) Online Residential and Commercial Valuation of Solar – 14 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Online Reviewing Residential Appraisals and Using Fannie Mae Form 2000 – 7 Hours – Online
(Instructor: Alan Simmons)
Both Course and Instructor Approved
- (CE) Online Small Hotel/Motel Valuation – 7 Hours – Online
(Instructor: David Lennhoff)
Both Course and Instructor Approved
- (CE) Online Subdivision Valuation – 7 Hours – Online
(Instructor: Don Emerson)
Both Course and Instructor Approved
- (CE) Online Supervisory Appraiser / Trainee Appraiser Course – 4 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Online The Appraiser's Guide to Expert Witnessing – 7 Hours – Online
(Instructor: Paula Konikoff)
Both Course and Instructor Approved
- (CE) Online The Discounted Cash Flow Model: Concepts, Issues & Apps – 5 Hours – Online
(Instructor: Kenneth Lusht)
Both Course and Instructor Approved

- (CE) Online Thinking Outside the Form – 4 Hours – Online
(Instructors: Alan Simmons & Mark Freitag)
Both Course and Instructors Approved
- (CE) Online Using Your HP12C Financial Calculator – 7 Hours – Online
(Instructor: Matthew Larrabee)
Both Course and Instructor Approved
- (CE) Online Valuation Resources for Photovoltaic Systems – 3 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Practical Applications in Appraising Green Commercial Properties – 14 Hours – Classroom
(Instructor: Timothy Runde)
Both Course and Instructor Approved
- (CE) Residential and Commercial Valuation of Solar – 14 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Residential Applications Part 1: Using Technology to Measure and Support Assignment Results – 7 Hours – Classroom
(Instructor: James B. Atwood)
Both Course and Instructor Approved
- (CE) Residential Applications Part 2: Using Microsoft Excel to Analyze and Support Appraisal Assignment Results – 7 Hours – Classroom
(Instructor: James B. Atwood)
Both Course and Instructor Approved
- (CE) Review Case Studies - General – 30 Hours – Classroom
(Instructor: Stephanie Coleman)
Both Course and Instructor Approved
- (CE) Review Theory - Residential – 15 Hours – Classroom
(Instructor: Craig Harrington)
Both Course and Instructor Approved
- (CE) Review Theory - General – 30 Hours – Classroom
(Instructor: Stephanie Coleman)
Both Course and Instructor Approved
- (CE) Rural Area Appraisals: Freddie Mac Guidelines and Property Eligibility – 7 Hours – Classroom
(Instructor: Mark Ratterman)
Both Course and Instructor Approved

- (CE) Rural Valuation Basics – 7 Hours – Classroom
(Instructor: Michael Tankersley)
Both Course and Instructor Approved
- (CE) Solving Land Valuation Puzzles – 7 Hours – Classroom
(Instructor: Brett W. Hall)
Both Course and Instructor Approved
- (CE) Supervisory Appraiser / Trainee Appraiser Course – 4 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) Supervisory Appraiser / Trainee Appraiser Course Synchronous – 4 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (CE) The Appraiser as the Expert Witness: Preparation and Testimony – 15 Hours – Classroom
(Instructor: Joseph Magdziarz)
Both Course and Instructor Approved
- (CE) The Cost Approach: Unnecessary or Vital for a Healthy Practice? – 7 Hours – Classroom
(Instructor: Craig Steinley)
Both Course and Instructor Approved
- (CE) Two Day Advanced Income Capitalization Part B – 14 Hours – Classroom
(Instructor: Ron Devries)
Both Course and Instructor Approved
- (CE) Two Day Advanced Income Capitalization Part A – 14 Hours – Classroom
(Instructor: Ron Devries)
Both Course and Instructor Approved
- (CE) Uniform Appraisal Standard for Federal Land Acquisitions: Practical Applications – 14 Hours – Classroom
(Instructor: John Underwood)
Both Course and Instructor Approved
- (CE) Valuation of Conservation Easement – 28 Hours – Classroom
(Instructor: Bruce Closser)
Both Course and Instructor Approved

- (CE) Valuation Resources for Solar Photovoltaic Systems – 4 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (LIC) Quantitative Analysis – 35 Hours – Classroom
(Instructor: Larry Wright)
Both Course and Instructor Approved
- (LIC) Advanced Concepts and Case Studies – 35 Hours – Classroom
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved
- (LIC) Advanced Market Analysis and Highest & Best Use Synchronous – 35 Hours – Online
(Instructors: Gary DeWeese, Kerry Jorgenson and Larry Wright)
Both Course and Instructors Approved
- (LIC) 2020-2021 15-Hour Equivalent USPAP Course – 15 Hours – Online
(Instructor: Thomas Kirby)
Both Course and Instructor Approved
- (LIC) 2020-2021 15-Hour National USPAP Course – 15 Hours – Classroom
(Instructor: Craig Harrington)
Both Course and Instructor Approved
- (LIC) Advanced Concepts and Case Studies Synchronous – 40 Hours – Online
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved
- (LIC) Advanced Income Capitalization – 35 Hours – Classroom
(Instructor: Stephen Roach)
Both Course and Instructor Approved
- (LIC) Advanced Income Capitalization - Synchronous – 35 Hours – Online
(Instructor: Thomas Kirby)
Both Course and Instructor Approved
- (LIC) Advanced Market Analysis and Highest & Best Use – 35 Hours – Classroom
(Instructor: David Lennhoff)
Both Course and Instructor Approved
- (LIC) Advanced Residential Applications & Case Studies, Part 1 - Synchronous – 15 Hours – Online
(Instructor: Richard Dubay)
Both Course and Instructor Approved

- (LIC) Advanced Residential Applications & Case Studies, Part 1 – 15 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (LIC) Advanced Residential Report Writing, Part 2 – 30 Hours – Classroom
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (LIC) Advanced Residential Report Writing, Part 2 - Synchronous – 30 Hours – Online
(Instructor: Richard Dubay)
Both Course and Instructor Approved
- (LIC) Online Basic Appraisal Principles – 30 Hours – Online
(Instructor: Richard Dubay)
Both Course and Instructor Approved
- (LIC) Basic Appraisal Principles – 30 Hours – Classroom
(Instructor: Thomas Kirby)
Both Course and Instructor Approved
- (LIC) Basic Appraisal Procedures – 30 Hours – Classroom
(Instructor: Thomas Kirby)
Both Course and Instructor Approved
- (LIC) Online Basic Appraisal Procedures – 30 Hours – Online
(Instructor: Richard Dubay)
Both Course and Instructor Approved
- (LIC) General Appraiser Income Approach Part 1 – 30 Hours – Classroom
(Instructor: Mark Smeltzer)
Both Course and Instructor Approved
- (LIC) General Appraiser Income Approach Part 2 – 30 Hours – Classroom
(Instructor: Ron Devries)
Both Course and Instructor Approved
- (LIC) General Appraiser Income Approach Part 2 – 30 Hours – Classroom
(Instructor: Mark Smeltzer)
Both Course and Instructor Approved
- (LIC) General Appraiser Market Analysis and Highest & Best Use – 30 Hours – Classroom
(Instructor: Robert Moorman)
Both Course and Instructor Approved

- (LIC) General Appraiser Sales Comparison Approach – 30 Hours – Classroom
(Instructor: Dana Thornberry)
Both Course and Instructor Approved
- (LIC) General Appraiser Site Valuation and Cost Approach – 30 Hours – Classroom
(Instructor: Kenneth Foltz)
Both Course and Instructor Approved
- (LIC) Online Real Estate Finance, Statistics and Valuation Modeling – 15 Hours – Online
(Instructor: Mark Smeltzer)
Both Course and Instructor Approved
- (LIC) Online Residential Market Analysis and Highest & Best Use – 15 Hours – Online
(Instructor: Edward Molinari)
Both Course and Instructor Approved
- (LIC) Online Residential Report Writing and Case Studies – 15 Hours – Online
(Instructor: Sandra Adomatis)
Both Course and Instructor Approved
- (LIC) Online Residential Sales Comparison and Income Approaches – 30 Hours – Online
(Instructor: Mark Ratterman)
Both Course and Instructor Approved
- (LIC) Online Residential Site Valuation and Cost Approach – 15 Hours – Online
(Instructor: Edward Molinari)
Both Course and Instructor Approved
- (LIC) Real Estate Finance, Statistics and Valuation Modeling – 15 Hours – Online
(Instructor: Mark Smeltzer)
Both Course and Instructor Approved
- (LIC) Residential Market Analysis and Highest & Best Use – 15 Hours – Classroom
(Instructor: Craig Harrington)
Both Course and Instructor Approved
- (LIC) Residential Report Writing and Case Studies – 15 Hours – Classroom
(Instructor: Alan Blankenship)
Both Course and Instructor Approved

- (LIC) Residential Sales Comparison & Income Approaches – 30 Hours – Classroom
(Instructor: Mark Ratterman)
Both Course and Instructor Approved
- (LIC) Residential Site Valuation and Cost Approach - Classroom – 15 Hours – Classroom
(Instructor: John Urubek)
Both Course and Instructor Approved

MCKISSOCK, LP

New Applications:

- (CE) Appraising Small Apartment Properties – 4 Hours - Classroom
(Instructors: Dan Bradley, Wally Czekalski, Chuck Huntoon, Philicia Lloyd, Dan Tosh, Bob Abelson, Tony Pistilli, Larry McMillen, Steve Vehmeier, Steve Maher, Dale Shae, Robert McClelland, and Julie Molendorp)
Both Course and Instructors Approved
- (CE) Bifurcated and Hybrid Appraisal: A Practical Approach – 4 Hours - Classroom
(Instructors: Dan Bradley, Wally Czekalski, Chuck Huntoon, Philicia Lloyd, Dan Tosh, Bob Abelson, Tony Pistilli, Larry McMillen, Steve Vehmeier, Steve Maher, Dale Shae, Robert McClelland, and Julie Molendorp)
Both Course and Instructors Approved
- (CE) New Construction Essentials: Luxury Homes – 3 Hours - Classroom
(Instructors: Dan Bradley, Wally Czekalski, Chuck Huntoon, Philicia Lloyd, Dan Tosh, Bob Abelson, Tony Pistilli, Larry McMillen, Steve Vehmeier, Steve Maher, Dale Shae, Robert McClelland, Julie Molendorp, Alex Gilbert, Josh Walitt, Joanne Bailey, Rob Luciani, Rob Frazier, and Charles Fisher)
Both Course and Instructors Approved
- (CE) Fundamentals of Expert Witness Testimony – 4 Hours - Classroom
(Instructors: Dan Bradley, Wally Czekalski, Chuck Huntoon, Philicia Lloyd, Dan Tosh, Bob Abelson, Tony Pistilli, Larry McMillen, Steve Vehmeier, Steve Maher, Dale Shae, Robert McClelland, Julie Molendorp, Alex Gilbert, Josh Walitt, Joanne Bailey, Rob Luciani, Rob Frazier, and Charles Fisher)
Both Course and Instructors Approved

- (CE) Using Appraisal Report Templates Responsibly – 3 Hours - Classroom
(Instructors: Dan Bradley, Wally Czekalski, Chuck Huntoon, Philicia Lloyd, Dan Tosh, Bob Abelson, Tony Pistilli, Larry McMillen, Steve Vehmeier, Steve Maher, Dale Shae, Robert McClelland, Julie Molendorp, Alex Gilbert, Josh Walitt, Joanne Bailey, Rob Luciani, Rob Frazier, and Charles Fisher)
Instructor Approved
- (LIC) 2020-2021 15-Hour National USPAP Course – 15 Hours - Classroom
(Instructors: Steve Maher, Bob Abelson, Rob McClelland, and Rob Luciani)
Both Course and Instructors Approved

MELISSA BOND QUALITY EDUCATION

New Applications:

- (CE) Highest & Best Use Analysis – 4 Hours – Classroom
(Instructor: Melissa Bond)
Both Course and Instructor Approved
- (CE) The Cost Approach – 4 Hours – Classroom
(Instructor: Melissa Bond)
Both Course and Instructor Approved
- (CE) Foreclosure Properties – 4 Hours – Classroom
(Instructor: Melissa Bond)
Both Course and Instructor Approved

Mr. Drew Watson asked if the Board had made a decision regarding PAREA (Practical Applications of Real Estate Appraisal) since several states had adopted it. Mr. Ball stated that he had been researching PAREA but did not feel comfortable making a recommendation at this time and asked Mr. Drew Watson which states had adopted it. Mr. Watson stated that Colorado had adopted PAREA fully and a couple of others piecemeal, but Ms. Bond could answer that. Mrs. Brooks stated that the Education Committee had deferred this discussion and that the Administrative Code will need to be changed if PAREA is adopted in any form and that she and Ms. Conway will need to be involved in any discussions. Ms. Bond added that not all states will be approving PAREA fully and that it will be up to each state to decide how to adopt it. Mr. Cotter asked Ms. Bond to forward the information she has to Mr. Ball.

10.0

AB 19-20 The Board entered into a Consent Settlement agreement with a Certified Residential appraiser where the appraiser agreed to an administrative fine of \$875 and to complete a 15-hour USPAP course. The violations cited are:

Licensee did not document his research to determine if the sales contract was an arm's length transaction and whether the transactions fit the definition the licensee was using in the assignment (he did not research how the property was marketed and for how long the property was on the market). Licensee made several adjustments to the comparable sales without having market support in the report or work file to explain the adjustment. Licensee also did not research if the buyer was knowledgeable about the local market and if there were any unusual conditions about the sale. Licensee's reporting of data and opinions and conclusions that were not supported by relevant evidence or logic make this report misleading. Licensee did not include in the report the analyses he performed to arrive at his opinions and conclusions. Licensee had no support for adjustments in Sales Comparison Approach. **Standards Rule 1-1(a), Rule 1-2(h), Rule 1-4(a), Rule 1-5(a), Rule 2-1(a), Rule 2-21(a)(vii), USPAP, 2016-2017 Ed.**

Letters of Warning were issued on the following investigations for the discrepancies indicated. This disciplinary action will be considered in any future discipline proceedings:

AB-19-10 Licensee made several large adjustments to the comparable sales used in the Sales Comparison Approach to value without market support or explanation in the report or work file. The licensee did not do an analyzes of the subjects highest and best use. The licensee only checked a box stating that the subjects highest and best use was its current use. Under Site value the licensee states the site value was developed through the use of market extraction which was supported by MLS lot sales but gives no data or analyzes to support this value. **STANDARDS RULE 1-1(a), 1-2(h), 1-4(a), USPAP 2018-19 Ed.**

Ms. Conway discussed with the Board the investigative status charts. Ms. Conway informed the Board that 8 new Appraiser complaints and no new Appraisal Management Company (AMC) complaints were received since the January 2021 Board meeting, 4 complaints were dismissed, and 2 complaint was settled, leaving a total of 39 open complaints.

11.0

The Board reviewed Probable Cause Report **AB-19-16**: With Mr. Anderson recusing, on motion by Mr. Ball and second Mr. Haller, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-19-17**: With Mr. Anderson recusing, on motion by Mr. Ball and second Mr. Haller, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-20-05**: With Mr. Anderson recusing, on motion by Mr. Haller and second by Mr. Ball, the Board voted that probable cause does exist set this case for hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-20-07**: With Mr. Ball recusing, on motion by Mr. Anderson and second by Mr. Pettey, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-20-10**: With Mr. Anderson recusing, on motion by Mr. Ball and second by Mr. Pettey, the Board voted that probable cause does exist and to set this case for a hearing. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-20-33**: With Mr. Ball recusing, on motion by Mr. Haller and second by Mr. Anderson, the Board voted that probable cause does not exist and to dismiss this case. Motion carried by unanimous vote.

The Board reviewed a Request for Board Initiated Complaint **AB-21-10**: With Mr. Haller recusing, on motion by Mr. Anderson and second by Mr. Ball, the Board voted to open a formal investigation. Mr. Butler abstained from the vote. Motion carried.

12.0 The Board reviewed the Consent Settlement Order on **AB-20-01**. With Mr. Ball and Mr. Haller recusing, on motion by Mr. Anderson and second by Mr. Drew Watson, the Board voted to approve this Consent Settlement Order. Motion carried by unanimous vote.

The Board reviewed the Consent Settlement Order on **AB-20-04**. With Mr. Ball and Mr. Haller recusing, on motion by Mr. Anderson and second by Mr. Drew Watson, the Board voted to approve this Consent Settlement Order. Motion carried by unanimous vote.

13.0 The following reciprocal license was issued since the January Board meeting: Thomas Patrick Clark ('R' VA), Christopher A. Farrell ('G' GA), Michael Friend ('G' TX), Matthew Gene Kimmel ('G' IN), Christopher Rice Myers ('G' CA), William D. Palmer, III ('G' GA), and Lev Yagudayev ('G' NY).

14.0 The Temporary Permit report was provided to the Board for their information.

15.0 The Appraisal Management report was provided to the Board for their information.

16.0 Ms. Conway presented letters received from Ms. Judith Haney regarding Ms. Haney's intent to file claims against the Real Estate Appraisers Board and agents acting on behalf of the board in the U.S. District Court for the Middle District of Alabama.

Ms. Conway revisited the IDEC approval for online discussion from the January Board meeting and stated that she had reached out to McKissock who informed her that they do track the response time, however they do not report it to anyone.

Mrs. Brooks updated the Board on the new database search. Mrs. Brooks explained that the next step is to post a Request for Proposal to the state website for vendors to place bids.

Ms. Conway asked the Board for approval going forward for Mrs. Brooks to contract with a vendor who she believes would be most beneficial to the agency. On motion by Mr. Butler and second by Ms. McClammy, the Board voted to grant Mrs. Brooks approval to contract with a vendor for a database. Motion carried by unanimous vote.

Mrs. Brooks discussed the Investigator position and informed the Board that she and Ms. Conway have twelve initial interviews set for next week.

Mrs. Brooks discussed the Statements of Economic Interest forms, which are due by April 30, 2021.

Mrs. Brooks informed the Board that the Association of Appraisal Regulatory Organizations (AARO) Spring conference will be held virtually May 3rd – 5th. She will send more information when she receives it.

Mrs. Brooks informed the Board that Ms. Conway has requested to return to the Board. She explained that Ms. Conway would be the Board's employee and that two other boards would also like to contract with the Alabama Real Estate Appraisers Board for Ms. Conway to be their legal counsel also. The other boards would each pay 1/3 of her benefits and salary to the Real Estate Appraisers Board. On motion by Mr. Anderson and second by Mr. Ball, the board voted to hire Ms. Conway and allow her to represent other agencies in this manner. Motion carried by unanimous vote.

Mr. Lew Watson thanked the Board and staff for the opportunity to work with them. Mrs. Brooks and Mr. Cotter thanked Mr. Lew Watson for his friendship and dedication to the Board.

17.0 There was no unfinished business to discuss at this time.

18.0 There was no new business to discuss at this time.

19.0

At 10:40 a.m., on motion by Mr. Drew Watson and second by Mr. Anderson, the Board voted to adjourn the regular Board meeting. Motion carried by unanimous vote. The Board's tentative meeting schedule for 2021 is May 20th, July 15th, September 16th, and November 18th, held either via WebEx or in the RSA Union 3rd Floor Conference Room, 100 Union Street, Montgomery, AL 36104.

Sincerely,

Carolyn Greene
Executive Secretary
/cg

APPROVED: _____
Billy Cotter, Chairman