

MINUTES
ALABAMA REAL ESTATE APPRAISERS BOARD
RSA UNION STREET
SUITE 370
MONTGOMERY, AL 36104
September 21, 2023

MEMBERS PRESENT:

Mr. Chad Anderson (Chairman)
Mr. Roger Ball
Mr. Richard D. Pettey
Mr. Billy Cotter
Mr. Mark Haller
Mr. Robert Butler

MEMBERS ABSENT:

Mrs. Melanie Housh (Vice-Chairman)
Mr. Drew Watson

STAFF PRESENT:

Mrs. Lisa Brooks, Executive Director
Ms. Neva Conway, Legal Counsel
Mrs. Carolyn Greene, Executive Secretary
Mr. Jimmy Green, Investigator
Mr. Sam Davis, Investigator

GUESTS PRESENT:

Mr. Tyler Parr, Trainee
Mr. Mandell Tillman

1.0 Mr. Chad Anderson, Chairman, called the meeting to order at 9:09 a.m. Mrs. Carolyn Greene, Executive Secretary, recorded the minutes. The meeting was held in the Suite 300 Conference Room of the RSA Union Building, 100 N. Union Street, Montgomery, Alabama. Prior notice of the meeting was posted on the Secretary of State's website on December 6, 2022, in accordance with the Alabama Open Meetings Act.

2.0 The meeting was opened with prayer led by Mr. Butler and the Pledge of Allegiance, led by Mr. Haller.

3.0 Mr. Anderson asked Mrs. Greene to call a voice roll to establish a quorum. Board members present were Mr. Anderson, Mr. Mark Haller, Mr. Robert Butler, Mr. Billy Cotter, Mr. Rick Pettey, and Mr. Roger Ball. Members absent were Mr. Drew Watson and Mrs. Melanie Housh. A quorum was established.

Mr. Anderson welcomed the guests and asked them to introduce themselves.

Mr. Anderson congratulated Investigator Mr. Sam Davis on his retirement and presented him with a plaque in recognition of his service to the Board from the Board and staff. Mrs. Brooks thanked Mr. Davis for his service, as well, and recognized him as not only a valued employee, but also a dear friend.

- 4.0 On motion by Mr. Cotter and second by Mr. Ball, the regular minutes for July 13, 2023, were approved as written. Motion carried by unanimous vote.
- 5.0 Ms. Conway informed the Board that the hearing scheduled is continued and there is a CSO for their consideration.
- 6.0 Ms. Conway informed the Board that the inventory of Administrative Rules has been completed as required under Executive Order 735. Governor Kay Ivey issued this Order, delivering on her commitment to making state government work with greater efficiency and accountability for the people of Alabama.
- 7.0 On motion by Mr. Pettey and second by Mr. Haller, the following applications were voted on as listed. Motion carried.
- 7.1 **Trainee Real Property Appraiser applications approved:** Stephanie Roxanne Johnston. **Applications approved:** None. **Applications denied:** None.
- Trainee Real Property Appraiser Experience Logs for Review: Logs reviewed:** James R. Baker, Grant Dickey and Ronald Curtis Vaughn. **Log Reviews deferred:** None.
- 7.2 **State Registered Real Property Appraiser applications approved:** None. **Applications deferred:** None. **Applications denied:** None.
- 7.3 **Licensed Real Property Appraiser applications approved:** None. **Applications deferred:** None. **Applications denied:** None.
- 7.4 **Certified Residential Real Property Appraiser applications approved:** None. **Applications deferred:** None. **Applications denied:** None.
- 7.5 **Certified General Real Property Appraiser applications approved:** Mark Alan Conner (Recip)(TN), Edward Dade (Recip)(LA), Randal Dana Dawson (Recip)(IL), William C. Haisten, III (Recip)(TN), Preston Heyward (Recip)(GA), Mark Lago (Recip)(KS), Michael McCaskill (Recip)(NC), Jonathon Sestak (Recip)(KS), Michael James Tyk (Recip)(TX), and Clarence Eric Williams (Recip)(GA). **Applications deferred:** R. Jason Wright. **Applications denied:** None.
- 7.6 **Mentor applications approved:** Donald Shelton. **Application deferred:** None. **Applications denied:** None.

8.0 Mr. Pettey presented the Finance report for August 2022-2023, reported that the Board was 92% into Fiscal Year 2023 and 68% into budget expenditures and that there were no negative trends that could not be reconciled at this time.

Mrs. Brooks explained the 606 Fund and investments.

On motion by Mr. Haller and second by Mr. Ball, the Board voted to research the cost feasibility of issuing USPAP books to all Alabama appraisers. Mrs. Brooks will report back to the Board in November.

Mr. Butler asked that the Board research Legislative action to change license renewals from every year to every other year to match issuance of new certificates.

On motion by Mr. Cotter 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. Cotter, the following education courses and instructor recommendations on the September Education agenda were approved, deferred, or denied as indicated. Motion carried by unanimous vote.

APPRAISAL INSTITUTE – ALABAMA/MISSISSIPPI CHAPTER

New Application:

(CE) Recent Zoning Trends and highest & Best Use Implications – 3 Hours – Classroom
(Instructor: W. Michael Brooks)
Both Course and Instructor Approved

APPRAISAL INSTITUTE – CHICAGO CHAPTER

New Applications:

(LIC) Advanced Market Analysis and Highest & Best Use Synchronous – 33 Hours – Classroom
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved

(CE) Condemnation Appraising Principles and Applications – 21 Hours - Classroom
(Instructor: Stephen Roach)
Both Course and Instructor Approved

(CE) Online Discounted Cash Flow Model Concepts, Issues, and Applications – 5 Hours - Online
(Instructor: Kerry Jorgensen)
Both Course and Instructor Approved

- (CE) Online Rapid Response Market Analysis in Volatile Markets – 7 Hours - Online
(Instructor: Lisa Meinczinger)
Both Course and Instructor Approved
- (CE) Online Rates and Ratios making Sense of GIMs, OARs, and DCF – 7 Hours - Online
(Instructor: Kenneth Lusht)
Both Course and Instructor Approved
- (LIC) Online Residential Report Writing and Case Studies – 15 Hours - Online
(Instructor: Dana Thornberry)
Both Course and Instructor Approved
- (LIC) Review Case Studies - General – 32 Hours - Classroom
(Instructor: Richard Borges)
Both Course and Instructor Approved
- (LIC) Review Case Studies - Residential – 15 Hours - Classroom
(Instructor: Craig Harrington)
Both Course and Instructor Approved
- (LIC) Review Theory - General – 33 Hours - Classroom
(Instructor: Robert Moorman)
Both Course and Instructor Approved

APPRAISER ELEARNING, LLC

New Applications:

- (CE) Creating Formulas that Work – .7 Hours - Classroom
(Instructor: Brent Bowen)
Both Course and Instructor Approved
- (CE) Measuring Square Footage with ANSI Z765-2021 – 4 Hours - Online (Instructor: David Hampton)
Both Course and Instructor Approved
- (CE) The Life of an Appraisal – What Happens Next? – 4 Hours - Classroom (Instructor: Pamela Teel)
Both Course and Instructor Approved

THE CE SHOP

New Applications:

- (LIC) 2020-2021 15-hour national USPAP Course – 15 Hours -
Online
(Instructor: Rebecca Jones)
Both Course and Instructor Approved
- (CE) Appraisal Ethics and Valuation Bias – 3 Hours -
Online
(Instructors: Rebecca Jones and Sam Martin)
Both Course and Instructors Approved
- (CE) Characteristics Influencing Appraisals – 6 Hours -
Online
(Instructors: Rebecca Jones and Sam Martin)
Both Course and Instructors Approved
- (CE) Reviewing Appraisal Valuation Procedures – 4 Hours -
Online
(Instructor: Rebecca Jones)
Both Course and Instructor Approved
- (CE) Reviewing Property Ownership and Real Estate Markets – 7 Hours
-Online
(Instructors: Rebecca Jones and Sam Martin)
Both Course and Instructors Approved

10.0 There was no disciplinary report to review at this time.

Ms. Conway discussed with the Board the investigative status charts. Ms. Conway reported that 18 new Appraiser complaints and no new Appraisal Management Company (AMC) complaints were received since the July 2023 Board meeting, 12 complaints were dismissed, and 0 complaint was settled, leaving a total of 45 open complaints.

Mr. Anderson asked how many complaints are received from Fannie Mae.

RE-CONSIDERATION HEARING

At 10:23 a.m., Ms. Conway convened the re-consideration hearing for Mr. Tyler Parr on his application for a Certified residential Real Property Appraiser license.

At 10:43 a.m., Ms. Conway closed the hearing.

At 10:44 a.m. on motion by Mr. Ball and second by Mr. Cotter, the Board voted to enter Executive Session to deliberate on the reconsideration of Mr. Parr's application for Certified Residential appraiser. Those in favor were Mr. Ball, Mr. Anderson, Mr. Butler, Mr. Cotter, Mr. Pettey and Mr. Haller. Motion carried by unanimous vote. Mr. Anderson announced that the Board should return to open session in 5 to 10 minutes.

At 10:51 a.m. on motion by Mr. Butler and second by Mr. Cotter, the Board voted to re-enter Regular Session. Those in favor were Mr. Ball, Mr. Anderson, Mr. Butler, Mr. Cotter, Mr. Pettey and Mr. Haller. Motion carried by unanimous vote.

On motion by Mr. Ball and second by Mr. Haller, the Board voted to approve Mr. Parr's application for upgrade to Certified Residential Real Property Appraiser. Mr. Anderson recused. Those in favor were Mr. Ball, Mr. Haller, Mr. Cotter, Mr. Pettey and Mr. Butler. Motion carried.

11.0 The Board reviewed Probable Cause Report **AB-22-28**: With Mr. Haller and Mr. Anderson recusing, on motion by Mr. Ball and second by Mr. Pettey, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-22-30**: With Mr. Anderson and Mr. Haller recusing, on motion by Mr. Pettey and second by Mr. Cotter, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-22-32**: With Mr. Haller and Mr. Anderson recusing, on motion by Mr. Butler and second by Mr. Ball, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-22-40**: On motion by Mr. Butler and second by Mr. Cotter, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-22-42**: With Mrs. Housh recusing, on motion by Mr. Ball and second by Mr. Cotter, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-22-44**: With Mr. Anderson recusing, on motion by Mr. Ball and second by Mr. Pettey, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-22-48**: With Mr. Anderson and Mr. Ball recusing, on motion by Mr. Cotter and second by Mr. Butler, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-23-18**: With Mr. Haller recusing, on motion by Mr. Pettey and second by Mr. Cotter, the Board voted that probable cause does not exist and to dismiss this case. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-23-20**: With Mr. Haller recusing, on motion by Mr. Pettey and second by Mr. Cotter, the Board voted that probable cause does not exist and to issue a Letter of Counsel. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-23-21**: With Mr. Anderson recusing, on motion by Mr. Butler and second by Mr. Ball, the Board voted that probable cause does not exist and to dismiss this case. Motion carried by unanimous vote.

The Board reviewed Probable Cause Report **AB-23-22**: With Mr. Anderson recusing, on motion by Mr. Butler and second by Mr. Ball, the Board voted that probable cause does not exist and to dismiss this case. Motion carried by unanimous vote.

12.0 The Board reviewed the Consent Settlement Order on **AB-21-22**. With Mr. Anderson recusing, on motion by Mr. Pettey and second by Mr. Haller, the Board voted to approve this Consent Settlement Order. Motion carried by unanimous vote.

The Board reviewed the Consent Settlement Order on **AB-22-29**. With Mr. Anderson recusing, on motion by Mr. Haller and second by Mr. Ball, the Board voted to approve this Consent Settlement Order. Motion carried by unanimous vote.

13.0 The following reciprocal licenses were issued since the July Board meeting: Mark Alan Conner ('G' TN), Edward Dade ('G' LA), Randal Dana Dawson ('G' IL), William C. Haisten, III ('G' TN), Preston Heyward ('G' GA), Mark Lago ('G' KS), Michael McCaskill ('G' NC), Jonathon Sestak ('G' KS), Michael James Tyk ('G' TX), and Clarence Eric Williams ('G' GA).

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 Mr. Anderson opened discussion on the Practical Applications of Real Estate Appraisal program. Mr. Ball explained PAREA to the Board and stated that Alabama is one of only five states that have not adopted PAREA yet. Mr. Ball will contact the Appraisal Institute to set up a webinar prior to or to have someone from AI at the November Board meeting.

After discussion regarding the Board meeting dates, the Board decided to move the meetings to the 2nd Thursday of every other month when possible.

- 17.0 Ms. Conway reported on the Investigator/contract employee position. She informed the Board that she is waiting to hear back from the Ethics Commission about a potential conflict question. Mr. Anderson tabled the topic until the November meeting.

Mr. Anderson asked Ms. Conway to explain the state's RFP process.

- 18.0 The Board discussed credit for attending AARO conferences. Seven hours continuing education credit can be granted to Board members or Investigators attending any AARO conference and the CLEAR course held in conjunction with the AARO meeting.

Board attendees discussed the Fall AARO conference.

- 19.0 At 11:41 a.m., on motion by Mr. Ball and second by Mr. Haller, the Board voted to adjourn the regular Board meeting. Motion carried by unanimous vote. The Board's tentative meeting schedule for 2023 is November 9th, held in the RSA Union 3rd Floor Conference Room, 100 Union Street, Montgomery, AL 36104.

Sincerely,



Carolyn Greene
Executive Secretary
/cg

APPROVED: _____



Chad Anderson, Chairman