

# General Associate Experience Review Requirements and Process Overview

## Experience Criteria

To meet Final Level experience requirements, both the work submitted and the associate member must exhibit an understanding and appropriate use of appraisal theory and practice (according to the Appraisal Institute Standards of Professional Appraisal Practice, if applicable); the work submitted must exhibit Significant Professional Responsibility; there must be a Reasonable Relationship of Hours; there must be Variety; and the work is defined as Specialized; it may not include one- to four-family residential real estate.

The work that is submitted for Experience credit must be the most recent qualifying work that has been performed within the previous 10 years. You must list all work you have completed during the time frame of your application, but no more than 1,500 hours of credit may be received for work performed in a 12-month period.

## Definition of Specialized Experience

Specialized Experience is work relating to other than one- to four-family residential real estate and covered by Standards Rules 1 through 6 of the Uniform Standards of Professional Appraisal Practice or experience gained by providing practical solutions to real property economics problems. This includes:

- a. **Valuation of real estate:** In developing a real property appraisal, the appraiser must identify the problem to be solved and the scope of work necessary to solve the problem, and correctly employ the appropriate research and analysis necessary to produce a credible appraisal. In reporting the results of a real property appraisal an appraiser must communicate each analysis, opinion and conclusion in a manner that is not misleading. (Qualifying work must meet Standards 1 and 2.)
- b. **Review of appraisal:** In reviewing an appraisal and reporting the results of that review, an appraiser must form an opinion as to the adequacy and appropriateness of the report being reviewed and must clearly disclose the nature of the review process. (Qualifying review appraisal work must meet Standard 3.)
- c. **Consulting:** In performing real estate or real property consulting services, an appraiser must be aware of, understand and correctly employ those recognized methods and techniques that are necessary to produce a credible result. In reporting the results of a real estate or real property consulting service, an appraiser must communicate each analysis, opinion and conclusion in a manner that is not misleading. (Qualifying work submitted must meet Standards 4 and 5.)
- d. **Mass appraisal:** In developing a mass appraisal, an appraiser must be aware of, understand and correctly employ those generally accepted methods and techniques necessary to produce and communicate credible appraisals. (Qualifying work must meet Standard 6.)
- e. **Real property economics:** Experience gained by providing practical solutions to real property economics problems. The experience must be real estate oriented. There must be a statement of a problem and/or scope-of-work outline. The associate member must demonstrate data collection and research techniques and provide analysis leading to a conclusion that is provided in a report format. This (problem, analysis, conclusion, reporting) would not be covered by Standards 1-6.

## **Experience Credit Application**

A General Associate must receive credit for 4,500 hours of Specialized Experience. (This assumes that you became an associate member July 1, 2006 or more recently. If this is not the case, see below.) The application for final level credit must cover at least a 36-month period, be the most recent work, and must deal with more than one type of real estate. One to Four family residential work does not qualify. Prior to applying for your experience credit you may choose to have an Advisory Review which provides free feedback about your work. (See Advisory Review for more information.)

If you are a General Associate and if you became an associate prior to July 1, 2006, you must receive credit for a total of 6000 hours. This includes an initial level of 3,000 hours and a Final Level of 3,000 hours of Specialized Experience performed after the work listed for the Initial Level.

Application for the Initial Level includes submitting a log of your work to the national office. If you are certified by your state, you may submit the same log sent to your state for your certification application instead of filling out an entirely new List of Assignments. If you are not certified by a state, you will need to fill out a List of Assignments that reflects 3,000 hours of experience. The List of Assignments form (Excel download) is available on the Web site. One of the purposes of establishing Initial Level is to provide a start date for work that qualifies for Final Level. If you are choosing to submit your state certification to establish your initial level, make sure that you are submitting your earliest certification. For instance – if you were state certified in 2000 and you submit a current certificate with a 1/1/2006 date, you cannot start to accumulate final level hours until 1/2/2006. You won't be able to count qualifying hours between 2000 and 2006 for final level. If you submit evidence of certification in 2000, you can count the hours after the date of certification for final level credit.

Final Level work must be after the work listed for the Initial Level. Your final level application of 3,000 hours must be your most recent work, deal with more than one type of real estate and demonstrate that substantially different knowledge, skills, or techniques were required to perform such work competently.

## **Experience Credit Process-General Associate**

Final Level Review is intended to be educational for you and at the same time allows the Reviewer to determine whether you meet the appropriate criteria. The Final Level Review is a one- or two-step process. In the past this review was conducted by a committee, but this became cumbersome due to the number of associates we process in a year. Now we use Screeners to do an initial review by phone. A Screener is authorized only to approve work. If you clearly meet the criteria, you will be granted experience credit. If the Screener is unclear about whether you meet any of the criteria, you will be referred to a Review Committee of three to five people, and they will conduct a full review and grant full, partial or no credit. (Often a Screener cannot determine some issues via phone or without looking at your work file; this is something that a committee is able to do when they meet with you in person.)

Application for Final Level Review includes a listing of your work that is submitted to the national office. The work listed must be the most recent qualifying work that you have conducted over the past 10 years. You will choose two reports for the review. Staff reviews the application and assigns your review to a Screener. The Screener will review your work list and choose 3 additional reports for the review. You will be advised of the selections and then requested to send all the reports to the Screener. You will also send copies to a local representative of the chapter whom the Screener will call.

You should provide full copies of the reports as they were provided to your client. You should also retain a copy for your reference during the interview. It is recommended that you have hard copies that you can page through with the Screener during the interview. You will not have time to reference the reports if they are only on your computer.

Once the Screener has received your work, he or she will read it and then schedule a time for a phone interview.

You can expect that the phone interview will take an hour to an hour-and-a-half. The Screener will discuss some or all of the reports with you and will likely ask you questions about the processes you used, your analysis and reasoning. You should be prepared to discuss the reports and have them available to review. You should also have read the reports and be generally familiar with them before the scheduled interview.

When the interview is completed, the Screener will advise the national office of the results. You will be notified of these results by letter within a few days—the Screener is not allowed to advise you of the decision. If your submission is approved, you will receive credit. If the Screener cannot approve the application, you will be referred to a Review Committee.

The Review Committee will comprise three to five people who will review the reports and call you in for an interview. The process is similar to that with the Screener except you will attend the interview in person, and there will be an interactive discussion with the full committee. You will bring your work files and the Review Committee members may examine materials from these files. The committee has the option to grant you full credit, partial credit or to deny credit. For associates who submit 4500 hours for final level, there may be an award difference. In addition to awarding full or half credit, the Review Committee may award partial credit in increments of 500 hours. The Review Committee will not advise you of the results—a letter will be sent from the national office within approximately 30 days of the interview. If you do not receive full credit after a Review Committee you will receive a written critique and can appeal the decision to an Appeals Board.

If you are denied full or partial credit, you may submit for another Advisory Review as long as it is before a re-submission for final level credit.

If you choose not to go to a Review Committee you will receive no credit for the assignments in the timeframe for which you applied. In the future, an application for experience credit will need to be your most recent work but it also will need to be work that was completed subsequent to this prior submission.

## Questions?

For questions about appraisal related issues:

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