

MAI Final Level Experience Application: Overview

Your application for the final level of specialized Experience will require completion of the Application for Experience Credits – MAI, and the List of Assignments. The following information is appropriate if you became an associate **prior** to July 1, 2006 and will be helpful for completing your application.

- Criteria and Review Procedures (Pages 2-6)
- Instructions for Completing the Application for Experience Credits and List of Assignments (Pages 7-10)
- Click here for: [Application](#) & [List of Assignments](#)

We suggest that you review the Criteria, Review Procedures, and Instructions presented in this document prior to completing and submitting your Application for Experience Credits and List of Assignments.

You may also find the following documents helpful:

- [Experience Review Guidance Tips for Associate Members](#)
- [Experience Review: Common Errors & Issues](#)
- [Appraisal Institute Certification Statements](#)
- [General Admissions Procedure Manual](#)
- [Regulation No. 1: Admission to General Associate Membership and MAI Membership](#)

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MAI Experience Criteria and Review Procedures

(For General Associate Members admitted prior to 7/1/2006)

Final Level: 3,000 Hours

I. Experience Requirement

The general associate member must receive credit for 3,000 hours of Specialized Experience, performed **after** work listed for [Initial Level Experience](#). The work submitted for review must cover at least a 24-month period and include the most recent work.

II. Definition of Specialized Experience

Specialized Experience is work relating to real estate other than one-to-four-family residential real estate and covered by Standards Rules 1 through 6 of the Standards of Professional Appraisal Practice of the Appraisal Institute, or experience gained by providing practical solutions to real property economics problems as may be further defined by the Admissions and Designation Qualifications Committee (ADQC).

- a) **Valuation of real estate:** In developing a real property appraisal, the appraiser must identify the problem to be solved and the scope of the 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.) Please be sure that work you list as “consulting” does indeed meet the USPAP definition of consulting: “...the purpose of an assignment...is always to develop, without advocacy, an analysis, recommendation, or opinion where at least one opinion of value is a component of the analysis leading to the assignment results. ...An opinion of value or an opinion as to the quality of another appraiser’s work cannot be the purpose of an appraisal consulting assignment. Developing an assignment for those purposes is an appraisal or an appraisal review assignment, respectively.” Additional scope of work information may be requested for consulting assignments.

- 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 Standard 1-6.

III. Other Requirements

A. Reasonable Relationship Between Hours and the Amount and Complexity of the Work

There must be a reasonable relationship between: (1) the number of hours claimed in a general associate member's application for experience credit and "List of Assignments," and (2) the amount and complexity of the work. If, in the opinion of the Screener, the number of hours claimed appears to be inconsistent with this requirement, the work may be referred to a review committee.

B. Significant Professional Responsibility

The general associate member must be able to demonstrate significant professional responsibility for work product submitted for experience credit. The general associate member must be able to show that he or she followed the appropriate process (es) and arrived at the analyses, opinions, and conclusions that were incorporated in the report (or file memoranda showing data, reasoning, and conclusions). The mere assembling and analyzing of facts relating to the solution of a valuation or evaluation problem does not necessarily result in significant professional responsibility.

To determine if the general associate member has significant professional responsibility for the identified work product, the reviewers may consider: (1) whether the associate member signed the reports or certification forms in the reports; (2) whether the associate member's name was listed in the certification forms as a person who had significant professional responsibility; and (3) other appropriate evidence. Standards Rule 2-2 (a, b, and c) (vii) indicates, "When any portion of the work involves significant real property appraisal assistance, the appraiser must summarize the extent of that assistance." Description of the assistance isn't required to be in the certification but must be in the report.

C. Variety

Work performed must 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. It is recognized that some work submitted will come from associate members who specialize in a narrow range of property types. This work may meet the variety criteria if the techniques or skills required vary from assignment to assignment. For instance, someone specializing in hospitality properties may complete assignments that include a downtown convention hotel and a suburban motel. These assignments require different techniques and expertise and may be considered different types of real estate.

Illustrative property types are:

- ❖ Multifamily residential
- ❖ Retail and commercial
- ❖ Office
- ❖ Industrial
- ❖ Agricultural
- ❖ All other property including land and special-purpose property, but excluding one- to four-family residential

IV. Experience Submission

- A general associate member shall apply for Specialized Experience evaluation and credit in one (1) submission.
- The work submitted for Specialized Experience credit must have been performed within the previous ten (10) years.
- The application must cover at least a 24-month period. No more than 1,500 hours of credit will be awarded for work performed in a twelve-month period.
- The work submitted must have been performed after the work listed for [Initial Level Experience](#) or on a previous application for final level experience.
- The work submitted for review must include the general associate member's *most recent* work.
- The work performed must exhibit variety.

NOTE: Work that was selected for advisory review may be listed but not selected for review on the List of Assignments for experience credit.

V. Standards and Other Criteria

The work must meet the Standards of Professional Appraisal Practice. The recognized methods and techniques necessary to perform a credible report in accordance with the Appraisal Institute's Standards of Professional Appraisal Practice are set forth in the Appraisal Institute's textbooks, courses, seminars, and other publications. The Standards in effect at the time of the work apply. If the Standards of Professional Appraisal Practice do not apply, the work must meet criteria appropriate to the type of work or the applicant's area of professional practice.

VI. Partial or No Credit

In addition to either no credit or full credit, partial credit of 1,500 hours may be awarded. If the award is either no credit or partial credit, the general associate member may reapply for the remaining hours (3,000 or 1,500 hours) of experience for work that began accruing after the date of the latest work in the most recently submitted List of Assignments.

VII. Procedure for Application

To apply for experience credit, you must complete and submit the following, electronically, to the Associate Member Service Center at experience@appraisalinstitute.org

- [MAI Experience Application: 3,000 Hours](#)
- [List of Assignments For General Associate Members \[EXCEL\]](#)

List only work that meets the criteria. (Do not list one-to-four-family properties.) During the time period for which credit is requested, you must list ALL assignments performed that meet the definition of Specialized Experience and for which you have significant professional responsibility.

Selection of work

Select two (2) reports (or assignments) that are representative of your best work. The Appraisal Institute suggests that you select assignments that reflect different types of real estate, if possible. (Work that was chosen for an advisory review may not be selected for this final level review.) Please refer to application directions when indicating these selections in your EXCEL List of Assignments. Please do not send your selected reports to the national office, either in hardcopy or electronic format.

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VIII. Experience Review Procedure

When we receive your experience submission, we will e-mail you acknowledgement of receipt. Once we have checked that your submission is complete, your submission will be sent to a screener in the order that it was received.

Assignments Selected for Review

You will be notified which reports from your List of Assignments to forward to the Screener prior to the interview. The Screener will select three assignments and you will select two assignments. You will have 5 days to provide the reports to the Screener.

Once your application and list of assignments are approved, you will be asked to submit your reports electronically. Associate Member Service Center staff will send you information via email on uploading your reports via a web browser. Please DO NOT e-mail any reports directly to the national office or the screener.

You should plan to have copies of your reports on hand to review prior to the interview and to have with you at the interview. Review the reports before the interview so you will be prepared to answer questions regarding the procedures and reasoning you applied in preparing the reports.

Screener Review

A Screener will review your work product and interview you. The Screener can recommend that experience be awarded or that your application be referred to a Review Committee. The Screener will notify you of the date and time of the experience interview, which will take place by telephone. If the Screener has any unresolved questions about your work after the interview or cannot clearly determine that you met the criteria, the application will be referred to an experience Review Committee for a second evaluation.

Review Committee

If the Screener refers your work to a Review Committee, and you choose, then a Review Committee will be formed to review your work. The Review Committee will be comprised of three to five members of the Experience Review Panel. They will be assigned to interview you and evaluate your experience. You will meet with the Review Committee in person.

Recommendation as to the Award of Experience Credit

If the recommendation of the Screener or Review Committee is that you receive all the experience credit requested, the Associate Member Services Department will post the credit on your experience record and advise you via e-mail that the requested experience credit has been awarded. If the Review Committee's recommendation is less than what you requested, a Critique form will be provided to you for each of the reports that they reviewed. You may request to appeal the decision to the Admissions Appeal Board. Your request must be made in writing to the Associate Member Services Department within sixty (60) days of the date of the letter of notification. Procedures governing appeal rights are described in Regulation No. 1.

Instructions for Completing the Application for Experience Credits and List of Assignments General Associate Members – 3,000 Hours

Application Instructions for Experience Credit 3,000 Hours

- Click here for: [Application for Experience Credit 3,000 Hours](#)
- Please make sure you FIRST login to your “My Appraisal Institute” webpage and confirm that all of your contact information is accurate.

Associate Member’s Request

Fill in the dates of the time period for which you have listed work. Verify that the dates of the time period on the application correspond to the dates of the assignments shown on the *List of Assignments*. List ALL work performed during this time period. Work must include the most recent, so it is appropriate to start your list with current work and list assignments going back in time.

You must apply for at least 3,000 hours of Specialized Experience, performed **after** work listed for [Initial Level Experience](#). The work submitted for review must cover at least a 24-month period and include the most recent work.

Associate Member’s Certification

Please make sure you go over this section carefully, and check each section/box off as it is confirmed. Sign and date the application. Be sure to keep a copy of your application and *List of Assignments* for your records. Sign and date your application.

Note: Review your list and check for “gaps.” “Gaps” are periods of inactivity of three (3) months or more where one report ends and another begins. These periods of inactivity may be explained by a host of reasons, which may include vacation time, pursuit of other economic endeavors, or performing reports that do not meet the definition of Specialized Experience. You must submit a letter explaining all “gaps”.

Payment Information

Please make sure you have completed the payment information section on your application.

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List of Assignments Instructions for Experience Credit

- Click here for: [List of Assignments](#) (Excel Spreadsheet)

Submission

Please submit your *List of Assignments* as a single spreadsheet; do not divide your work into separate pages or spreadsheets unless you are instructed to do so. If it is necessary to mark off different time periods on your *List of Assignments*, feel free to footnote it as necessary.

Your *List of Assignments* should be submitted as an electronic (Excel) document so that it can be sorted and processed. Please note that handwritten *List of Assignments* will NOT be accepted.

Please complete the Associate Member Contact information section.

Prior Business/Employment

List all previous business and/or employment, encompassing the time period of the work listed.

Time Period of Hours

Please enter the Time Period of 3,000 Hours of experience that you are applying for.

Filling Out Your Log

The following items should be filled out for EVERY assignment:

- ❖ **Date**
Indicate the date of the report or date report was completed.
- ❖ **Assignment Identification/[Size or Units]**
Fill in the address of the appraised property OR the identification, and the size or units.
- ❖ **Hours**
Hours per assignment. Do not include 1-4 family properties.

The following items should be filled out for your MOST RECENT 1,500 Hours of Work (over at least 12-months):

- ❖ **Use**
Indicate the use of the report, e.g., mortgage, tax appeal, estate, condemnation, etc.
- ❖ **Value Range**
Enter the dollar range of property value:
 - 0–500,000
 - 501,000 to 2 Million
 - 2 Million to 10 Million
 - 10 Million +

❖ **Property Type**

Enter one of the following:

- Multi-Family
- Office
- Retail
- Industrial
- Agricultural Land
- Non Agric. Land
- Other. (Including analyst and consultant work, e.g., highest and best use studies, feasibility studies, and market studies.)

❖ **Report Format**

For appraisals, enter one of the following:

SC = Self-Contained

S = Summary

R = Restricted

For non-appraisals, enter "NA."

❖ **Significant Professional Responsibility**

Enter one of the following:

SS = Sole Signer

C-S = Co-Signer

DNS = Did not sign (Provide a written explanation if you did not sign.)

❖ **Standards**

Indicate the type of experience:

V = Valuation

R = Review (Enter "Y" if you adjusted the value conclusion. For example: R/Y)

C = Consulting

M = Mass

O = Standards 1-6 do not apply (must be non-valuation assignments)

Selecting Reports/Assignments for Review

Select **two (2) reports/assignments** that are representative of your best work, and have make note of your selections by highlight or boldface. (Do not select assignments that were used for a previous advisory review. Please do NOT send your reports with your application.)

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Submission: Application and List of Assignments

Please submit your application and *List of Assignments* electronically to experience@appraisalinstitute.org. You may submit your Application as a PDF, JPG, or TIF (by scanning and emailing). If you are paying by check, please indicate “check to follow” and send a copy of your Application with the check to the address at the bottom of the application. Credit card payments should be indicated on the application itself. The *List of Assignments* should be submitted in Excel format.

- ❖ Submit both the Application and *List of Assignments* to experience@appraisalinstitute.org

Note: If you have submitted your application, payment, and List of Assignments electronically, please do not send hard additional copies.

Assistance with Experience Submission

If you need assistance completing your Application for Experience Credits and/or List of Assignments, please contact experience@appraisalinstitute.org or (312) 335-4111.