

## Advisor Bulletin: First Quarter 2020

Dear Advisors, Chapter Presidents, and Chapter Executive Staff:

**Why am I getting this Bulletin, anyway?!?**

If you are a chapter executive director or president, or candidate advisor, you are getting this bulletin to keep you current on Admissions and CE topics that have recently come up. If you hold none of these positions or are an advisor who had intended to leave the program, let me know and I'll check into it!

**Candidate contact log**

Thanks to everyone who has been catching up on their comments; it's extremely helpful, especially when we can't get in touch with a lapsing Candidate, to see what your most recent experiences have been.

One new note: while it's pretty easy for you to find a Candidate's contact information in your Portal (just click the UPDATE button for that Candidate and it's all at the top of the page), the reverse isn't true: a Candidate needs to **SHOW MET REQUIREMENTS** (in their Candidate Checklist) and click on the Candidate Advisor item to see your contact details.

You can find a handy video on accessing the advisor portal, as well as recent bulletin issues and the advisor handbook, here: [advisor resources](#)

A couple repeat items:

- If you have a new Candidate and don't have a place to leave notes for the current quarter, let me know. I need to add these manually and although I check at least once weekly, you may need it sooner. Also, when I add the comment section manually, it often shows up as "completed" even though you haven't left a note, so if you don't remember leaving one, go ahead and click in to check.
- First-year Standards and Ethics requirement: This is a lot clearer on the new website, since it's broken down into separate USPAP (Standards) and AI *Business Practices and Ethics* requirements. Unless a new Candidate has completed **both** requirements in the last 4 years, they will need to complete the USPAP and BPE requirements in their first year of candidacy. If they took USPAP through an outside provider during the relevant time period, they can upload a copy of their completion certificate via the standards requirement checklist item. BPE covers our own Code of Professional Ethics, and therefore must be taken through AI.

**Chapter reports: Quantitative Analysis**

We had a question come up about Quantitative Analysis. The Chapter reports show you who has MET the requirement but it doesn't always reflect who still needs it. **Anyone that has a join date of BEFORE 1/1/2012 is not required to pass Quantitative Analysis;** it was not required on the MAI path prior to that date. The Candidate's own Checklist will correctly show their remaining requirements, so both the Candidate and Advisor will always know what that specific Candidate still needs.

**Annual Minimum Progress and inactive Candidates**

Many of you have seen a recent flurry of communication from Admissions to Candidates concerning Annual Minimum Progress (AMP). You may remember that AMP was required as part of the Candidate for Designation program beginning in 2013 and was, at first, a set number of requirements to be completed each year. It has since been revised to include ANY progress made annually.

It's not that unusual for a Candidate to not attempt any requirements in a given year; the courses were all at the wrong time or wrong place, they didn't have enough experience to submit, the demo requirement took longer than

expected, etc. That's not a big deal: they may apply for an extension and outline their plan of action for the upcoming year and are given the appropriate extension. If they are registered for something in the upcoming year, we will automatically provide an extension. Attempting a requirement but not completing it – such as taking an exam but failing – is considered progress and will meet the AMP requirement for that year.

Where it becomes an issue is when someone didn't do anything in one year, then doesn't plan to do anything in the subsequent year. The Candidate for Designation program is for individuals who are **actively** pursuing designated membership. There is no such thing as an "inactive" status for a Candidate. If there are unusual circumstances such as severe protracted illness, military deployment, extreme financial hardship – there is a "prolonged extension" they may apply for (documentation is required). But aside from that, a Candidate is required to continue to make progress annually, whether by taking the Comprehensive Examination, registering for a course or challenge exam, submitting experience, etc. If someone can't do that, or isn't sure whether they can, it then becomes a matter of looking at what they could lose if they leave the program and return at a later date. Admissions can discuss these items with Candidates. Things Candidates should consider are:

- Completed requirements that are more than 10 years old when the person readmits are no longer valid upon readmission (except for the college degree and the Comprehensive Exam)
- Candidates are subject to designation requirements in place at the time of readmission
- Candidates may not readmit to the same designation path (from which they resigned or were terminated) until at least one year has passed

### **Candidate paths & advisee counts**

I've had several people ask where on the website they can see which paths they've agreed to advise on, and the maximum number of Candidates they requested. Your advisor portal will not have these details. If you have any questions about these items, please let me know and I can assist. We are perennially short of review advisors, so if you've added the AI-GRS and/or AI-RRS designations to your CV, we'd love it if you'd be willing to add those to the paths on which you advise.

And as always, if a Candidate is unresponsive and you feel like you're spinning your wheels, I'm happy to get that person reassigned (even if it's just assigned to me and not another designated member advisor); we have too many Candidates who need advisors for us to waste your time on someone who doesn't want your help.

### **Financial aid**

A reminder was just sent out to all Candidates concerning national scholarships, since the next deadlines are April 1<sup>st</sup> or 15<sup>th</sup> (depending on the scholarship). Scholarship information can be found on the [AIERF website](#), along with information on emergency financial assistance in the case of disaster or emergency.

### **Recommended order in which to take required courses for the MAI**

The question has been coming up again, so here is the answer from the Education Department:

1. Advanced Income
2. Advanced Market Analysis & HBU (*must take Income first*)
3. Quantitative Analysis
4. Advanced Concepts & CS (*must take Income first, recommended to have Market Analysis*)

As always, thank you for your service to the AI!

Best Regards,  
Emma Abraham  
[advisors@appraisalinstitute.org](mailto:advisors@appraisalinstitute.org)