

## Designated Members as Candidate Advisors

The primary purpose of this document is to provide information to Designated Members about serving as Advisors in the Candidate for Designation Program. The document covers such issues as eligibility, selection, length of service, role and responsibilities and continuing education credit. The Appraisal Institute also may identify staff or contractors to serve as Advisors, but this document generally is not applicable to them.

### Summary

If a Designated Member would like to serve as an Advisor in the Candidate for Designation Program and is eligible to serve, the Appraisal Institute may place the Designated Member on a list of approved Advisors.

A Candidate may request a particular Advisor, or the Appraisal Institute can identify a potential Advisor for the Candidate. An Advisor can decide whether to accept assignment as an Advisor for specific Candidate(s). The Appraisal Institute will make the final decision as to who will serve as an Advisor for a specific Candidate.

A Candidate and his or her Advisor will be in contact with one another on a regular basis. The Advisor can serve as a resource for the Candidate, providing the Candidate with the benefit of his or her years with the Appraisal Institute and the appraisal profession generally. The Advisor can help the Candidate by using his or her knowledge of the basic Appraisal Institute designation requirements. The Advisor also can help direct the Candidate to resources on the Appraisal Institute web site and at the national headquarters for more technical and detailed information and guidance. The Advisor can encourage the Candidate in his or her efforts to become an Appraisal Institute Designated Member.

### Advisor Role and Responsibilities

1. To know the basic requirements for the MAI, SRA, AI-GRS, and AI-RRS designations, which may include:
  - a) Experience
  - b) Demonstration of knowledge (including identification of options to complete)
  - c) Comprehensive examination
2. To have regular contact (at least quarterly) with the Candidate in person, via phone and/or via email.
3. To log my regular contact (at least quarterly) in the Advisor Portal on your AI login page.
4. To respond to the Candidate's questions, concerns, and requests as appropriate.
5. To encourage and help the Candidate with creating achievable timelines for completing designation requirements.
6. To monitor the Candidate's progress towards designated membership on their Required Time Period and to encourage the Candidate to be accountable for meeting such timelines.
7. To encourage the Candidate to complete all designation requirements and become a Designated Member.
8. To guide the Candidate to appropriate resources, such as Appraisal Institute admissions staff members and information on the Appraisal Institute web site.
9. To coach the Candidate through active listening, observation, and support; and

10. To encourage the Candidate to manage his/her own learning.

### **Eligibility to Serve as Advisor**

For a Designated Member to serve as an Advisor, the Designated Member must:

1. Be a Designated Member in good standing.
2. Not have been subject to a publishable disciplinary action by the Appraisal Institute within the five (5) years prior to selection.
3. Be adept at and possess technical capability for prompt Internet communication including the ability to access and respond to e-mail.
4. Complete the Advisor orientation program as approved by the Admissions and Designation Qualifications Committee (ADQC).
5. Sign the official Appraisal Institute form agreement with Advisors.
6. Be motivated to help Candidates achieve designation and have the time to devote to serve as an effective Advisor.
7. Have a positive, supportive, encouraging, and professional approach when interacting with Candidates; and
8. Have met such other minimum qualifications the Board of Directors or ADQC may adopt.

### **Selection as an Advisor**

If a Designated Member would like to serve as an Advisor in the Candidate for Designation Program and is eligible to serve, the Appraisal Institute may place the Designated Member on a list of approved Advisors.

A Candidate may request a particular Advisor, or the Appraisal Institute can identify a potential Advisor for the Candidate. An Advisor can decide whether to accept assignment as an Advisor for specific Candidate(s). The Appraisal Institute will make the final decision as to who will serve as an Advisor for a specific Candidate.

A Designated Member can serve as an Advisor for just one or more Candidates. Advisors should consider how many Candidates that they can serve effectively given other demands on their time.

### **Length of Service as an Advisor**

To help maximize the benefits of the Advisor Program for Candidates, an Advisor should expect to serve in that role for the duration of the Candidate program for which they are serving as Advisor. The length of a Required Time Period is four (4) years. Candidates, if eligible, may request additional Required Time Periods.

### **End of Advisor Role**

A Designated Member no longer will be an Advisor in the Candidate for Designation Program if he or she:

1. Requests that he or she no longer serve in the Advisor program.
2. No longer meets one or more of the eligibility requirements to serve as an Advisor.
3. Receives a publishable disciplinary action by the Appraisal Institute; or
4. Does not stay up to date on the content of Appraisal Institute communications, including but not limited to, the content of all non-commercial e-mails originating from the national organization, the individual's region, and the individual's chapter.

An Advisor also will cease serving in that role for a specific Candidate if the Advisor or Candidate so requests, or if the Candidate's candidacy ends.

**Service on Candidate Guidance Committees**

Each Chapter will have a Candidate Guidance Committee. The role of these Committees is to facilitate networking among Advisors in the Chapter and to arrange Chapter programs and events for Candidates to encourage and help them in their efforts to become Appraisal Institute Designated Members.

Advisors in a Chapter are strongly encouraged to contact their Chapter Presidents to seek appointment to their Chapter Candidate Guidance Committees.

**Advisor Eligibility for Continuing Education Credit**

An Advisor may receive up to 125 points (25 hours) of credit in the category of "Service as A Candidate Advisor" towards their AI CE cycle in accordance with the Bylaws, Regulation No. 10, and policies of the Appraisal Institute.

Questions ? [admissions@appraisalinstitute.org](mailto:admissions@appraisalinstitute.org)

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