

State of Alaska
Board of Certified Real Estate Appraisers

Board Packet

November 19, 2018

Teleconference
333 Willoughby Ave. 9th Floor
Conference Room B
Juneau, AK 99801

Call To Order/ Roll Call


**Alaska Board of Certified Real Estate Appraisers
Board Roster (As of 02/22/2018)**

Board Member	Appointed	Reappointed	Term Expires
David Derry, Chair <i>Certified General Real Estate Appraiser</i> Kenai, AK 99611	03/01/2014	3/1/2018	03/01/2022
Wendy Lawrence <i>Certified Residential Real Estate Appraiser</i> Sitka, AK 99835-1373	03/01/2018		03/01/2022
Robert Tracy <i>Certified Residential Real Estate Appraiser</i> Wasilla, AK 99654	03/14/2016		03/01/2020
Renee Piszczek <i>Mortgage Banking Executive</i> Fairbanks, AK 99701	09/02/2014	03/01/2017	03/01/2021
Donald Faulkenburry <i>Public Member</i> Anchorage, AK 99515	05/30/2017		03/01/2021

Ethics

MEMORANDUM

State of Alaska Department of Law

TO: _____ DATE: _____
FILE NO.: _____
TEL. NO.: _____
FROM: Angie White
Litigation Assistant
Department of Law
Opinions, Appeals, & Ethics Section
FAX: _____
SUBJECT: Executive Branch Ethics Act, AS
39.52 Quarterly Report


******SAMPLE LANGUAGE – PLEASE COPY ONLY THE PARTS THAT APPLY
ONTO YOUR BOARD OR COMMISSION’S LETTERHEAD ******

As designated ethics supervisor and chair [executive director] for the _____, I wish to advise you that I have received no notifications of potential violations or requests for ethics determinations under the Ethics Act (AS 39.52) and have made no written determinations for this quarter.

OR

As designated ethics supervisor and chair [executive director] for the _____, I have received ___ notification(s) of a potential violation and ___ requests for ethics determinations under the Ethics Act (AS 39.52) I have attached a copy of the notices and requests along with my written determination(s) for review by the attorney general. I did [did not] receive an advisory opinion from the Attorney General.

AND

Except as addressed above, no other [board member] [commissioner] disclosed a potential conflict of interest at a recorded public meeting during this quarter.

OR

In addition to the above, at the [date] meeting, [Board member] [Commissioner] _____ disclosed a potential conflict with respect to _____ [*insert brief description*]____. *Insert disposition:* [S/He refrained from participation.] *or* [I determined s/he could [could not] participate.] *or* [The Board [Commission] members voted to permit [not to permit] participation.]

CONFIDENTIAL

ETHICS SUPERVISOR DETERMINATION FORM

(Board or Commission Member)

Board or Commission: _____

Member Disclosing Potential Ethics Violation: _____

I have determined that the situation described on the attached ethics disclosure form

does or would violate AS 39.52.110 - .190. Identify applicable statute below.

does not or would not violate AS 39.52.110 - .190.

Signature of Designated Ethics Supervisor (Chair)

Printed Name of Designated Ethics Supervisor

Date: _____

COMMENTS (Please attach a separate sheet for additional space):

Note: Disclosure Form must be attached. Under AS 39.52.220, if the chair or a majority of the board or commission, not including the disclosing member, determines that a violation of AS 39.52.110-39.52.190 will exist if the member participates, the member shall refrain from voting, deliberating, or participating in the matter. A member will not be liable under the Ethics Act for action in accordance with such a determination so long as the member has fully disclosed all facts reasonably necessary to the determination and the attorney general has not advised the member, chair, or board or commission that the action is a violation. Forward disclosures with determinations to the State Ethics Attorney as part of your quarterly report. Quarterly reports are submitted to Litigation Assistant, Opinions, Appeals & Ethics, Department of Law, 1031 W. 4th Avenue, Suite 200, Anchorage, AK 99501.

Revised 2012

State of Alaska Department of Law

Who Is My Designated Ethics Supervisor?

Every state public officer, employee or board or commission member, has a designated ethics supervisor.

Executive Agencies

The ethics supervisor for each agency is the Commissioner or a senior manager to whom the Commissioner has delegated the function. The current ethics supervisor for each agency is listed below. The ethics supervisor for a Commissioner is Guy Bell, Director of Administrative Services in the Office of Governor, by delegation from the Governor.

Boards and Commissions

The Chair of each board and commission serves as the ethics supervisor for the other members and any executive director. The ethics supervisor for the Chair is Guy Bell, Director of Administrative Services in the Office of Governor, by delegation from the Governor. If a board or commission employs staff, the executive director serves as the ethics supervisor for these employees.

Public Corporations

The Chair of the board serves as the ethics supervisor for the other members of the board and any executive director. The executive director is the ethics supervisor for employees of the corporation.

Office of the Governor

The ethics supervisor for the Governor and Lieutenant Governor is the Attorney General. By delegation from the Governor, the ethics supervisor for the staff of the offices of the Governor and Lieutenant Governor is Guy Bell, Director of Administrative Services.

University of Alaska

By delegation of the University President, the ethics supervisor for university employees is Associate General Counsel Andy Harrington.

EXECUTIVE BRANCH AGENCIES

Administration: Leslie Ridle, Deputy Commissioner

Commerce, Community & Economic Development: Jon Bittner, Deputy Commissioner

Corrections: April Wilkerson, Director of Administrative Services

Education & Early Development: Les Morse, Deputy Commissioner

Environmental Conservation: Tom Cherian, Director of Administrative Services

Fish & Game: Kevin Brooks, Deputy Commissioner

Health & Social Services: Dallas Hargrave, Human Resource Manager

Labor & Workforce Development: Michael Monagle, Director, Division of Workers Compensation

Law: Jonathan Woodman, Assistant Attorney General

Military & Veterans Affairs: Marty Meyer, Special Assistant to Commissioner

Natural Resources: John Crowther, Inter-Governmental Coordinator

Public Safety: Terry Vrabec, Deputy Commissioner

Revenue: Dan DeBartolo, Administrative Services Director

Transportation & Public Facilities:

- Highways & Public Facilities: Steve Hatter, Deputy Commissioner
- Aviation: John Binder, Deputy Commissioner
- Central Region: Rob Campbell, Regional Director
- Northern Region: Rob Campbell, Acting Regional Director
- Southcoast Region: Acting Regional Director
- Alaska Marine Highway System: Michael Neussl, Deputy Commissioner
- Headquarters: Mary Siroky, Administrative Services Director

Updated April 2015

Department of Law attorney.general@alaska.gov P.O. Box 110300, Juneau, AK 99811-0300
Phone: 907-465-3600 Fax: 907-465-2075 TTY: 907-258-9161
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State of Alaska

Department of Law

Ethics Information for Members of Boards & Commissions (AS 39.52)

Introduction

This is an introduction to AS 39.52, the Alaska Executive Branch Ethics Act. This guide is not a substitute for reading the law and its regulations. State board and commission members who have further questions should contact their board chair or staff.

The Ethics Act applies to all current and former executive branch public employees and members of statutorily created boards and commissions.

Scope of Ethics Act (AS 39.52.110)

Service on a state board or commission is a public trust. The Ethics Act prohibits substantial and material conflicts of interest. Further, board or commission members, and their immediate family, may not improperly benefit, financially or personally, from their actions as board or commission members. The Act does not, however, discourage independent pursuits, and it recognizes that minor and inconsequential conflicts of interest are unavoidable.

Misuse of Official Position (AS 39.52.120)

Members of boards or commissions may not use their positions for personal gain or to give an unwarranted benefit or treatment to any person. For example, board members may not:

- use their official positions to secure employment or contracts;
- accept compensation from anyone other than the State for performing official duties;
- use State time, equipment, property or facilities for their own personal or financial benefit or for partisan political purposes;
- take or withhold official action on a matter in which they have a personal or financial interest; or
- coerce subordinates for their personal or financial benefit.
- attempt to influence outcome of an administrative hearing by privately contacting the hearing officer.



Terry knew that a proposal that was before the board would harm Terry's business competitor. Instead of publicly disclosing the matter and requesting recusal, Terry voted on the proposal.



Board member Mick has board staff employee Bob type an article for him that Mick hopes to sell to an Alaskan magazine. Bob types the article on State time.

Improper Gifts (AS 39.52.130)

A board member may not solicit or accept gifts if a person could reasonably infer from the circumstances that the gift is intended to influence the board member's action or judgment. "Gifts" include money, items of value, services, loans, travel, entertainment, hospitality, and employment. All gifts from registered lobbyists are presumed to be improper, unless the giver is immediate family of the person receiving the gift.

A gift worth more than \$150 to a board member or the board member's immediate family must be reported within 30 days if:

- the board member can take official action that can affect the giver, or
- the gift is given to the board member because he or she is on a state board.

The receipt of a gift worth less than \$150 may be prohibited if a person could reasonably infer from the circumstances that the gift is intended to influence the board member's action or judgment. Receipt of such a gift should be disclosed.

Any gift received from another government, regardless of value, must be reported; the board member will be advised as to the disposition of this gift.

A form for reporting gifts is available at www.law.alaska.gov/doclibrary/ethics or from the board or commission staff.

This restriction on gifts does not apply to lawful campaign contributions.



The commission is reviewing Roy's proposal for an expansion of his business. Roy invites all the board members out to dinner at an expensive restaurant. He says it will be okay, since he isn't excluding any of the members.



Jody receives a holiday gift every year from Sam. Jody was recently appointed to a state board, but Sam has no business that is before the board. Jody may accept the gift.

Improper Use or Disclosure of Information (AS 39.52.140)

No former or current member of a board may use or disclose any information acquired from participation on the board if that use or disclosure could result in a financial or personal benefit to the board member (or immediate family), unless that information has already been disseminated to the public. Board members are also prohibited from disclosing confidential information, unless authorized to do so.



Sheila has been on the board for several years. She feels she has learned a great deal of general information about how to have a successful business venture. So she sets up her own business and does well.



Delores has always advised and assisted the other doctors in her clinic on their continuing education requirements. After Delores is appointed to the medical board, she discloses this role to the board and continues to advise the doctors in her clinic.



Jim reviews a confidential investigation report in a licensing matter. He discusses the practitioner's violation with a colleague who is not a board member.

Improper Influence in State Grants, Contracts, Leases or Loans (AS 39.52.150)

A board member, or immediate family, may not apply for, or have an interest in a State grant, contract, lease, or loan, if the board awards or takes action to administer the State grant, contract, lease, or loan.

A board member (or immediate family) may apply for or be a party to a competitively solicited State grant, contract or lease, if the board as a body does not award or administer the grant, contract, or lease and so long as the board member does not take official action regarding the grant, contract, or lease.

A board member (or immediate family) may apply for and receive a State loan that is generally available to the public and has fixed eligibility standards, so long as the board member does not take (or withhold) official action affecting the loan's award or administration.

Board members must report to the board chair any personal or financial interest (or that of immediate family) in a State grant, contract, lease or loan that is awarded or administered by the agency the board member serves. A form for this purpose is available at www.law.alaska.gov/doclibrary/ethics or from the board or commission staff.



John sits on a board that awards state grants. John hasn't seen his daughter for nearly ten years so he figures that it doesn't matter when her grant application comes up before the board.



The board wants to contract out for an analysis of the board's decisions over the last ten years. Board member Kim would like the contract since she has been on the board for ten years and feels she could do a good job.

Improper Representation (AS 39.52.160)

A board or commission member may not represent, advise, or assist a person in matters pending before the board or commission for compensation. A nonsalaried board or commission member may represent, advise, or assist in matters in which the member has an interest that is regulated by the member's own board or commission, if the member acts in accordance with AS 39.52.220 by disclosing the involvement in writing and on the public record, and refraining from all participation and voting on the matter. This section does not allow a board member to engage in any conduct that would violate a different section of the Ethics Act.



Susan sits on the licensing board for her own profession. She will represent herself and her business partner in a licensing matter. She discloses this situation to the board and refrains from participation in the board's discussions and determinations regarding the matter.

Restriction on Employment After Leaving State Service (AS 39.52.180)

For two years after leaving a board, a former board member may not provide advice or work for compensation on any matter in which the former member personally and substantially participated while serving on the board. This prohibition applies to cases, proceedings, applications, contracts, legislative bills, regulations, and similar matters. This section does not prohibit a State agency from contracting directly with a former board member.

With the approval of the Attorney General, the board chair may waive the above prohibition if a determination is made that the public interest is not jeopardized.

Former members of the governing boards of public corporations and former members of boards and commissions that have regulation-adoption authority, except those covered by the centralized licensing provisions of AS 08.01, may not lobby for pay for one year.



The board has arranged for an extensive study of the effects of the Department's programs. Andy, a board member, did most of the liaison work with the contractor selected by the board, including some negotiations about the scope of the study. Andy quits the board and goes to work for the contractor, working on the study of the effects of the Department's programs.



Andy takes the job, but specifies that he will have to work on another project.

Aiding a Violation Prohibited (AS 39.52.190)

Aiding another public officer to violate the Ethics Act is prohibited.

Agency Policies (AS 39.52.920)

Subject to the Attorney General's review, a board may adopt additional written policies further limiting personal or financial interests of board members.

Disclosure Procedures

DECLARATION OF POTENTIAL VIOLATIONS BY MEMBERS OF BOARDS OR COMMISSIONS (AS 39.52.220)

A board member whose interests or activities could result in a violation of the Ethics Act if the member participates in board action must disclose the matter on the public record and in writing to the board chair who determines whether a violation exists. A form for this purpose is available at www.law.alaska.gov/doclibrary/ethics or from the board or commission staff. If another board member objects to the chair's ruling or if the chair discloses a potential conflict, the board members at the meeting (excluding the involved member) vote on the matter. If the chair or the board determines a violation will occur, the member must refrain from deliberating, voting, or participating in the matter. For more information, see Ethics Act Procedures for Boards and Commissions available at the above noted web site.

When determining whether a board member's involvement in a matter may violate the Ethics Act, either the chair or the board or commission itself may request guidance from the Attorney General.

ATTORNEY GENERAL'S ADVICE (AS 39.52.240-250)

A board chair or a board itself may request a written advisory opinion from the Attorney General interpreting the Ethics Act. A former board member may also request a written advice from the Attorney General. These opinions are confidential. Versions of opinions without identifying information may be made available to the public.

REPORTS BY THIRD PARTIES (AS 39.52.230)

A third party may report a suspected violation of the Ethics Act by a board member in writing and under oath to the chair of a board or commission. The chair will give a copy to the board member and to the Attorney General and review the report to determine whether a violation may or does exist. If the chair determines a violation exists, the board member will be asked to refrain from deliberating, voting, or participating in the matter.

Complaints, Hearings, and Enforcement

COMPLAINTS (AS 39.52.310-330)

Any person may file a complaint with the Attorney General about the conduct of a current or former board member. Complaints must be written and signed under oath. The Attorney General may also initiate complaints based on information provided by a board. A copy of the complaint will be sent to the board member who is the subject of the complaint and to the Personnel Board.

All complaints are reviewed by the Attorney General. If the Attorney General determines that the complaint does not warrant investigation, the complainant and the board member will be notified of the dismissal. The Attorney General may refer a complaint to the board member's chair for resolution.

After investigation, the Attorney General may dismiss a complaint for lack of probable cause to believe a violation occurred or recommend corrective action. The complainant and board member will be promptly notified of this decision.

Alternatively, if probable cause exists, the Attorney General may initiate a formal proceeding by serving the board or commission member with an accusation alleging a violation of the Ethics Act. Complaints or accusations may also be resolved by settlement with the subject.

CONFIDENTIALITY (AS 39.52.340)

Complaints and investigations prior to formal proceedings are confidential. If the Attorney General finds evidence of probable criminal activity, the appropriate law enforcement agency shall be notified.

HEARINGS (AS 39.52.350-360)

An accusation by the Attorney General of an alleged violation may result in a hearing. An administrative law judge from the state's Office of Administrative Hearings serves as hearing officer and determines the time, place and other matters. The parties to the proceeding are the Attorney General, acting as prosecutor, and the accused public officer, who may be represented by an attorney. Within 30 days after the hearing, the hearing officer files a report with the Personnel Board and provides a copy to the parties.

PERSONNEL BOARD ACTION (AS 39.52.370)

The Personnel Board reviews the hearing officer's report and is responsible for determining whether a violation occurred and for imposing penalties. An appeal may be filed by the board member in the Superior Court.

PENALTIES (AS 39.52.410-460)

When the Personnel Board determines a board member has violated the Ethics Act, it will order the member to refrain from voting, deliberating, or participating in the matter. The Personnel Board may also order restitution and may recommend that the board member be removed from the board or commission. If a recommendation of removal is made, the appointing authority will immediately remove the member.

If the Personnel Board finds that a former board member violated the Ethics Act, it will issue a public statement about the case and will ask the Attorney General to pursue appropriate additional legal remedies.

State grants, contracts, and leases awarded in violation of the Ethics Act are voidable. Loans given in violation of the Ethics Act may be made immediately payable.

Fees, gifts, or compensation received in violation of the Ethics Act may be recovered by the Attorney General.

The Personnel Board may impose a fine of up to \$5,000 for each violation of the Ethics Act. In addition, a board member may be required to pay up to twice the financial benefit received in violation of the Ethics Act.

Criminal penalties are in addition to the civil penalties listed above.

DEFINITIONS (AS 39.52.960)

Please keep the following definitions in mind:

Benefit - anything that is to a person's advantage regardless financial interest or from which a person hopes to gain in any way.

Board or Commission - a board, commission, authority, or board of directors of a public or quasi-public corporation, established by statute in the executive branch, including the Alaska Railroad Corporation.

Designated Ethics Supervisor - the chair or acting chair of the board or commission for all board or commission members and for executive directors; for staff members, the executive director is the designated ethics supervisor.

Financial Interest - any property, ownership, management, professional, or private interest from which a board or commission member or the board or commission member's immediate family receives or expects to receive a financial benefit. Holding a position in a business, such as officer, director, partner, or employee, also creates a financial interest in a business.

Immediate Family - spouse; another person cohabiting with the person in a conjugal relationship that is not a legal marriage; a child, including a stepchild and an adoptive child; a parent, sibling, grandparent, aunt, or uncle of the person; and a parent or sibling of the person's spouse.

Official Action - advice, participation, or assistance, including, for example, a recommendation, decision, approval, disapproval, vote, or other similar action, including inaction, by a public officer.

Personal Interest - the interest or involvement of a board or commission member (or immediate family) in any organization or political party from which a person or organization receives a benefit.

For further information and disclosure forms, visit our Executive Branch Ethics web site or please contact:

State Ethics Attorney
Alaska Department of Law
1031 West 4th Avenue, Suite 200
Anchorage, Alaska 99501-5903
(907) 269-5100
attorney.general@alaska.gov

Revised 9/2013

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Department of Law
Executive Branch Ethics Act

Responsibilities of Designated Ethics Supervisors for Boards and Commissions

Boards and commissions subject to the Ethics Act have designated ethics supervisors. The chair serves as the designated ethics supervisor for board or commission members and the executive director. The executive director is the designated ethics supervisor for staff. The designated ethics supervisor for a chair is the governor, who has delegated this responsibility to Guy Bell, Administrative Director of the Office of the Governor.

Designated ethics supervisors should refer to the Manual for Designated Ethics Supervisors (April 2008), available from the state ethics attorney, regarding their responsibilities under the Ethics Act. Briefly, as designated ethics supervisor, you must --

1. Ensure that members and employees are provided copies of the guides, Ethics Information for Members of Boards and Commissions and Ethics Act Procedures for Boards and Commissions -- and keep a supply of disclosure forms.
 1. These guides, other educational materials, disclosure forms, statutes and regulations are available for review and copying on the Department of Law ethics web site. If access to this page is not available, please contact the Attorney General's office at 269-7195.
2. Review all disclosures, investigate potential ethics violations, make determinations regarding conduct, and take action.
3. Keep member or employee disclosure statements (of potential violations, receipt of gifts, and interests in grants/contracts/leases/loans) on file in your office. Disclosure of a gift received from another government must be forwarded to the Office of the Governor.
4. Submit an ethics report to the Department of Law in April, July, October and January for the preceding quarter. You will receive a reminder. There is a sample report on the ethics web page.
 1. Mail, email or fax to Kim Halstead, Litigation Assistant, Department of Law, Opinions, Appeals & Ethics Section, 1031 W. 4th Avenue, Suite 200, Anchorage, AK, 99501, ethicsreporting@alaska.gov, fax no. 907-279-2834.

You may request ethics advice from your agency's Assistant Attorney General or from the State Ethics Attorney, Jon Woodman, at 269-5100 or jonathan.woodman@alaska.gov. Please direct questions about reporting procedures to Kim Halstead at 269-7195 or kimberly.halstead@alaska.gov.

6/14

Department of Law attorney.general@alaska.gov P.O. Box 110300, Juneau, AK 99811-0300
Phone: 907-465-3600 Fax: 907-465-2075 TTY: 907-258-9161
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Review/Approve Agenda



The State of Alaska
Board of Certified Real Estate Appraisers
State Office Building
333 Willoughby Ave, 9th Floor
Conference Room B
Juneau, AK 99801
Conference Line Call In: 1-800-315-6338
Access Code: 52588

November 19, 2018
9:00 a.m.
Meeting Agenda (Draft)

<u>Item</u>	<u>Time</u>	<u>Subject</u>	<u>Lead</u>
1	9:00 a.m.	Call to Order/Roll Call	Chair
2	9:05	Ethics Report	Chair
3	9:10	Review/Approve Agenda	Chair
4	9:15	Review/Approve Past Meeting Minutes	Chair
5	9:20	Board Business • Continuing Education Consent Agreements Case: 2017-000176 (Executive Session, if needed)	Paralegal Zimmerman
6	10:00	Investigations Case Reviews & Probation Reports • Memos & Consent Agreements (Executive Session, if needed)	Shyla Consalo
7	10:30	Division Update & Financial Report	Sara Chambers
8	10:45	Regulations Draft Review • AQB Draft Regulation Review • AMC Draft Regulation Review	Chair Sher Zinn Sher Zinn
9	12:00	Lunch	Chair



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333 Willoughby Ave, 9th Floor
Conference Room B
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Access Code: 52588

September 24, 2018
9:00 a.m.
Meeting Agenda (Draft)

<u>Item</u>	<u>Time</u>	<u>Subject</u>	<u>Lead</u>
10	1:15	Public Comment	Chair
11	1:30	Old Business <ul style="list-style-type: none">• AARO Report Back• Task List Review	Chair
12	2:00	Administrative Business <ul style="list-style-type: none">• New Task List	Chair
13	2:30	Adjourn	Chair

Review/Approve
Past Meeting Minutes

Minutes for Review

September 24,

2018

1 STATE OF ALASKA
2 DEPARTMENT OF COMMERCE, COMMUNITY, & ECONOMIC DEVELOPMENT
3 DIVISION OF CORPORATIONS, BUSINESS, & PROFESSIONAL LICENSING

4 BOARD OF CERTIFIED REAL ESTATE APPRAISERS

5
6 MINUTES OF THE BOARD MEETINGS

7 Monday, September 24, 2018

8
9 *These are DRAFT minutes prepared by the staff of the Division of Corporations, Business, and*
10 *Professional Licensing.*

11
12 *These minutes have not been reviewed or approved by the Board.*

13
14 By the authority of AS 08.01.070(2), and in compliance with the provisions of AS 44.62, Article
15 6, a scheduled meeting of the Board of Certified Real Estate Appraisers was held at the Robert
16 B. Atwood Building, 550 W. 7th Ave, Suite 1560, Anchorage, Alaska on **Friday, May 11, 2018.**

17
18 **Agenda Item #1** **Call to Order/Roll Call**

19
20 The meeting was called to order at 9:09 a.m. by David Derry, Chair.

21
22 Those present, constituting a quorum of the Board:

23 David Derry, Chair, Certified General Real Estate Appraiser
24 Wendy Lawrence, Certified Residential Real Estate Appraiser
25 Robert Tracy, Certified Residential Real Estate Appraiser
26 Renee Piszczek, Mortgage Lending Member
27 Donald Faulkenburry, Public Member – via teleconference

28
29 Division Staff present at the meeting:

30 Tracy Wiard, Occupational Licensing Examiner
31 Renee Hoffard, Records and Licensing Supervisor
32 Greg Francois, Chief Investigator
33 Amber Whaley, Senior Investigator
34 Shyla Consalo, Investigator III
35 Melissa Dumas, Administrative Officer II – via teleconference
36 Marylene Wales, Accountant III – via teleconference
37 Marilyn Zimmerman, Paralegal II – via teleconference

38
39 **Agenda Item #2** **Ethics Disclosure/Review Ethics**

40
41 Wendy Lawrence stated she had a complaint about an appraiser forwarded to her and she stated
42 she was not sure how to handle it. Chair Derry advised she contact the person reporting the

43 complaint and have them follow the designated process on the Appraisal Board Website. Ms.
44 Lawrence stated that is what she did and she did not open or forward the e-mail complaint.
45 Renee Hoffard stated that she should also have the complainant contact the division's
46 investigations unit.

47

48 **Agenda Item #3** **Review Agenda**

49

50 Chair Derry prompted the board to review the meeting agenda. There were no changes made to
51 the agenda.

52

53 **On a motion made by Renee Piszczek, seconded by Wendy Lawrence, and passed**
54 **unanimously, it was: RESOLVED to APPROVE the agenda as written.**

55

56 **Agenda Item #4** **Review/Approve Minutes**

57

58 The board briefly discussed the teleconference minutes from the July 25, 2018 meeting. Chair
59 Derry noted that task numbers 1 & 2 from the July 25, 2018 task list are included in the current
60 agenda under item number 5. No one expressed any needed corrections or alterations to the
61 teleconference meeting minutes from July 25, 2018.

62

63 **On a motion made by Robert Tracy, seconded by David Derry, and passed unanimously, it**
64 **was: RESOLVED to APPROVE the July 25, 2018 meeting minutes as written.**

65

66 The board briefly discussed the August 13, 2018 teleconference meeting minutes. The board
67 noted no discrepancies and did not require any revisions to the minutes.

68

69 **On a motion made by Renee Piszczek, seconded by Robert Tracy, and passed unanimously,**
70 **it was: RESOLVED to APPROVE the August 13, 2018 meeting minutes as written.**

71

72 **Agenda Item #5** **Old Business**

73

74 **Previous Task List**

75

76 Chair Derry noted that the task list in the current board packet had been renumbered and was
77 different from the July 25, 2018 task list. David Derry brought the boards' attention to task list
78 item number 1 on the July 25, 2018 task list. Chair Derry noted that the current FAQ #9 on
79 CBPL APR website states that the Supervisory Trainee Course for Appraisers does qualify for
80 qualifying education but not continuing education. Chair Derry went on to note that the current
81 information listed on the boards' website is incorrect. Chair Derry made a reference to the Q &
82 A section of the Appraisal Qualifications Board (AQB) page 15, item number 4 which stated that
83 the course can be used for continuing education but not qualifying education.

84

85 ***TASK: OLE Wiard will correct FAQ # 9 on APR website to state that the Supervisory***
86 ***Appraiser/Trainee Appraiser Course is acceptable for continuing education but not for***
87 ***qualifying education.***

88
89 Chair Derry then directed the board to task item #2 regarding the removal of the Determination
90 of Competency Form in the applications and for the form to be added to the APR website. The
91 Division previously decided to keep the form in the Residential and General Application and add
92 it to the Trainee Application as well as to the APR website. Chair Derry noted that this form
93 should be completed and submitted by both the supervisory appraiser and the trainee as soon as
94 the form was completed. Discussion was brought up about how the division keeps the
95 submission if the trainee appraiser is not registered since they are not required to be a registered
96 trainee in Alaska. It was stated that the forms are submitted and retained in a file by the CBPL
97 and is matched up with an applicant once they apply for a license.

98
99 ***TASK: OLE Wiard to add an FAQ to the website stating the Determination of Competency***
100 ***Form be submitted well in advance of having the trainee apply for an Appraisal License to***
101 ***make sure they are filed and received before an application is received.***

102
103 Chair Derry noted Task list item 10, 11 and 12 will be discussed when Chief Francois addresses
104 the board. He went on to note he was foggy on task number 14 as he was not sure of the
105 discrepancy he noted on July 4, 2018 regarding course approval process. Chair Derry went on to
106 say he brought up an issue about the review of work products and the attached e-mail chain in
107 the board packet was regarding the review of work product issue and forms which is a separate
108 agenda item. Chair Derry noted the e-mail should still be completed and he is unsure of the
109 status.

110
111 ***TASK: OLE Wiard will send an e-mail to course sponsors we get the most approvals from to***
112 ***set guidelines for the course approval process and make sure the form matches the AQB. To***
113 ***send Board copy of e-mail.***

114
115 Chair Derry went on to note there have been problems with the Appraisal Institute submitting
116 continuing education and qualifying education courses. There have been issues by the Appraisal
117 Institute submitting fully completed applications for course approval. This makes the process
118 lengthier and the OLE cannot submit the application to the board for approval until they are
119 complete. It was noted that CBPL staff attempts to keep the APR Board from any reproach by
120 ASC audits.

121
122 Qualifying Education vs. Distance Education

123
124 Chair Derry directed the board to page 59 of the board packet to question 7, “Does the board
125 maintain that all qualifying education must be completed by live, in person classroom hours?”
126 The board previously answered yes to question 7 stating all qualifying education must be

127 completed by live, in person classroom hours. Chair Derry went on to note that this was a
128 violation of the current regulations and needed to be corrected.

129

130 **On a motion made by Robert Tracy, seconded by Wendy Lawrence, and passed**
131 **unanimously, it was: RESOLVED to APPROVE that the board clarify item question 7 on**
132 **page 59 of the current Board Packet and amend it to state that Certification of Real Estate**
133 **Appraisers may be taken online per current regulations.**

134

135 Chair Derry directed the board to question 6 on page 58 of the board packet, “Can distance
136 education be substituted for classroom hours for qualifying or continuing education if the AQB
137 criteria for classroom hours via distance education is met?” He stated his uncertainty of the
138 question.

139

140 *TASK: OLE Wiard to send the Chair Derry the Board of Counselors definitions of traditional*
141 *classroom, synchronous classroom and distance education.*

142 *Chair Derry and OLE Wiard to talk to someone at the October AARO Conference to see if*
143 *ASC has a definition of classroom education, synchronous education, and distance education.*

144

145 Thank You Letters:

146

147 Chair Derry mentioned thank you letters he mailed to Representative Johnson and Senator
148 Meyer. The letters were part of the board packet.

149

150 Regulations Questionnaire Run Through

151

152 Supervisor Renee Hoffard went through the Regulations Changes Questionnaire for the Board.
153 Renee made sure the board was made aware of question 8 on the Regulations Changes
154 Questionnaire. Question 8 regards oral testimony for regulation changes, planning oral
155 testimony with enough time for public comment and a meeting to allow oral testimony.

156

157 Division Investigative staff joined the meeting.

158

159 **Agenda Item #6 Investigative Case Review & Probation Reports**

160

161 Chief Francois addressed the board and introduced Amber Whaley, Senior Investigator for Non-
162 health care boards and Shyla Consalo who is be the new Investigator III for CBPL assigned to
163 the Real Estate Appraiser Board. Chief Francois explained the breakdown of the investigations
164 staff organization into medical and non-medical investigators. Investigator Whaley is
165 Investigator Consalo’s immediate supervisor. Chief Francois also submitted his reports showing
166 4 open cases and 2 closed cases for the time period of April 19, 2018 through September 19,
167 2018. Chief Francois noted he could not report on any active investigative cases.

168

169 **On a motion made by Robert Tracy, seconded by Renee Piszczek, and passed unanimously,**
170 **it was: RESOLVED to enter into Executive Session in accordance with AS 44.62.310(a),**
171 **and Alaska Constitutional Right to Privacy Provisions, for the purpose of discussing active**
172 **investigations cases, “subjects that tend to prejudice the reputation and character of any**
173 **person, provided the person may request a public discussion.” Board and Investigative**
174 **staff were requested to remain in the room for executive session.**

175

176 Board entered Executive Session at 10:06 A.M.

177 Board left Executive Session at 10:21 A.M.

178

179 **On a motion made by Renee Piszczek, seconded by Robert Tracy, and passed unanimously**
180 **with a roll call vote, it was: RESOLVED to UPHOLD the recommendation to deny the**
181 **supervisory appraiser application for case #2018-000461.**

182

183 Chief Francois addressed the board and spoke regarding the board’s request for a panel of review
184 appraisers that could do appraisal reviews on applications as cases came in. Chair Derry felt the
185 panel was necessary due to the amount of time involved in reviewing cases to determine if there
186 are any violations of USPAP. Chair Derry explained the amount of time it takes to be
187 geographically competent and discussed how a review panel with people who already had the
188 geographic competency would drastically reduce time spent on reviews. Chair Derry also
189 suggested an update to the Commission Member Review Form so that they would comply with
190 USPAP standards. Chair Derry went on to state that any reviewer of an appraiser is required
191 follow USPAP review standards. If the review is not USPAP compliant then the review would
192 be considered invalid and the state could incur a liability.

193

194 Chief Francois explained the board not use Commission Member Review Forms as the board is
195 not a commission. He advised the board to use the Board Member Review Forms and remain
196 consistent in this process to parallel the other boards in the Division. He also explained if a case
197 went to an Administrative Hearing there may be questions regarding why the board is treated
198 differently than other boards for use of separate forms and a separate review panel. In the event
199 a reviewing member of the board believed they could not make a determination, the form would
200 be the place to state that. Chief Francois made it clear that the board does have the option of
201 consulting the legal advice of an attorney general if needed. It was also noted that the time
202 constraints of the reviews are lengthy and involved but as volunteers for the state of Alaska they
203 are being tasked to provide the most thorough reviews they can as they are considered the subject
204 matter experts in Real Estate Appraisal as appointed by the governor. It was noted that only
205 licensed appraisers are part of the review process for their subject matter expertise.

206

207 **Agenda Item #7 Division Update & Financial Report**

208

209 Administrative Officer II Melissa Dumas and Accountant III Marylene Wales joined the meeting
210 telephonically to present the Division Update and Financial Report.

211

APR	3rd Quarter of FY 2018
\$50,030.00	Licensing Revenue
\$67,810.00	Direct Expenditures
\$13,913.00	Indirect Expenditures

\$81,723.00	Total Expenses
(\$31,693.00)	Annual Surplus (Deficit)
\$374,791.00	Beginning Cumulative Surplus (Deficit)
\$343,098.00	Ending Cumulative Surplus (Deficit)

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The chair called for a recess. The board went off the record at 11:15 A.M.
The Board returned on the record at 11:30 A.M.

Division Paralegal II, Marilyn Zimmerman, joined the meeting telephonically.

Agenda Item #8 Board Business

Continuing Education Consent Agreement

On a motion made by Renee Piszczek, seconded by Robert Tracy, and passed unanimously, it was: RESOLVED to enter into Executive Session in accordance with AS 44.62.310(a), and Alaska Constitutional Right to Privacy Provisions, for the purpose of discussing continuing education consent agreements, “subjects that tend to prejudice the reputation and character of any person, provided the person may request a public discussion.” Board staff and Division Paralegal II Marilyn Zimmerman to remain for executive session.

Board entered Executive Session at 11:30 A.M.
Board left Executive Session at 11:36 A.M.

On a motion made by Renee Piszczek, seconded by Robert Tracy, and passed unanimously with a roll call vote, it was: RESOLVED to APPROVE the consent agreement for case #2017-001175.

Supervisor Renee Hoffard addressed the board informing them that they had received a public comment regarding the regulation changes the board has been working on and asked if they would be interested in amending the current agenda to discuss the comment. Chair Derry recommended the topic be added as the third subject under new business (agenda item 9.)

Agenda Item #9 New Business

Work Product Review

The board discussed the divisions’ current process of requesting the work product review samples after an applicant for an appraisal license has passed the required exam. The board discussed the current process as being more time consuming and less efficient than it could be. The board discussed the process of accepting the work samples prior to the applicant taking the exam. The board also discussed requiring at least 2 work product samples to satisfy ASC requirements and that this may need to be addressed when reviewing the public comment for the current regulations project.

253 **On a motion made by Robert Tracy, seconded by Wendy Lawrence, and passed**
254 **unanimously, it was: RESOLVED to APPROVE the revision of the existing division policy**
255 **regarding work sample requests to request a minimum of 2 work product samples at the**
256 **time of approval as opposed to waiting for the applicant to take and pass the exam.**

257
258 *TASK: OLE Wiard to update FAQ to include new process regarding work product samples*
259 *being submitted before the applicant takes the exam.*

260 *Supervisor Renee Hoffard and OLE Tracy Wiard to look at all applicants that have been*
261 *approved since the 1st of the year and see who has taken the exam. Send updates and request*
262 *work products as needed.*

263
264 Board went off record for lunch at 11:55 A.M.
265 Board returned on the record at 1:09 P.M.

266
267 **Agenda Item #10 Public Comment**

268
269 There was no public comment for the board.

270
271 **Agenda Item #9 New Business**

272
273 **Investigative Disciplinary Matrix**

274
275 The board reviewed disciplinary matrixes that are currently used by other boards within the
276 division. The board discussed the pros and cons of utilizing a disciplinary matrix. Currently
277 disciplinary sanctions and consent agreements are drafted for the AG by utilization of board
278 precedent. The board opted not to utilize or create a disciplinary matrix for sanctions or consent
279 agreements. The board did note the use of the continuing education disciplinary matrix that is
280 utilized by the paralegal for continuing education sanctions and consent agreements.

281
282 **Regulations Projects**

283
284 The board received a public comment e-mail from ASC Executive Director, James Park
285 regarding the current regulations listed for public comment under Title 12, chapter 70 that are in
286 the regulation change process. Mr. Parks suggested that board change vague language currently
287 being proposed to include the use of specific language indicating the board selects a minimum of
288 2 work products from the appraisal log submitted by the applicant and that the applicant does not
289 get to pick their own work sample for submission.

290
291 The second comment from Mr. Park indicated that the AQB and the IDECC are not responsible
292 for submitting recertification documents for course recertification. The comment indicated the
293 recertification documents are required to be submitted by the course provider. The board
294 discussed the public comment suggestions and discussed motions to divide the regulations being
295 changed into two sections. One section to be approved as drafted and one for further revision.

296
297 **On a motion made by Robert Tracy, seconded by Wendy Lawrence, and passed**
298 **unanimously, it was: RESOLVED to ACCEPT the proposed amendments as written to the**
299 **following regulations and forward them to the Lieutenant Governor for signature:**
300 **12 AAC 70.100**

301 **12 AAC 70.115**
302 **12 AAC 70.125**
303 **12 AAC 70.200(d)**
304 **12 AAC 70.210**

305
306 The board discussed the wording of the regulations requesting work samples from the appraisal
307 log submitted by applicants. The board agreed that the following language be drafted into the
308 regulations to clarify the work product requirements for 12 AAC 70.105(b)(1)(E), 12 AAC
309 70.111(2) and 12 AAC 70.112(2):

310
311 *Submit a copy of the work product from a minimum of two appraisals performed by the*
312 *applicant, selected by the board, and included in the log of appraisals submitted under 12 AAC*
313 *70.110(a);*

314
315 For the regulation change to 12 AAC 70.113(2) the following wording was discussed to be used:

316
317 *Submit a copy of a non-residential work product from a minimum of two appraisals performed*
318 *by the applicant, selected by the board, and included in the log of appraisals submitted under 12*
319 *AAC 70.110(a);*

320
321 The board also agreed to add a new subsection 12 AAC 70.200(e)(1) to read:

322
323 *The department will update the course or seminar expiration date if the course provider submits*
324 *recertification documents, but will not update the course or seminar expiration date if the AQB*
325 *or IDECC recertification exceeds three years from the date of initial approval;*

326
327 **On a motion made by Renee Piszczek, seconded by Robert Tracy, and passed unanimously,**
328 **it was: RESOLVED to change the wording as the board discussed to the following**
329 **regulations and forward them to the regulations specialist for further public comment as**
330 **required.**

331 **12 AAC 70.105(b)(1)(E)**
332 **12 AAC 70.111(2)**
333 **12 AAC 70.112(2)**
334 **12 AAC 70.113(2)**
335 **12 AAC 70.200(e)(1)**

336
337 ***TASK: Supervisor Renee Hoffard to e-mail a new certification document to Chair Derry for***
338 ***signature.***

339
340 **Agenda Item #11 Administrative Business**

341
342 **Correspondence**

343 The board had one correspondence item from Claire Brooks who is the policy manager at ASC.
344 The board was asked to schedule a face to face meeting with Ms. Brooks. They will schedule a
345 time to meet with ASC on the agenda of the August 2, 2019 Board Meeting.

346
347 ***TASK: OLE Wiard to add in person meeting time with ASC to agenda on 8/2/2019 board***
348 ***meeting in Anchorage.***

349

350 Meeting Calendar

351

352 A November 19, 2018 teleconference for the APR Board is currently scheduled at 9:00 am. The
353 board noted that they may need an additional meeting between November and January 1, 2019 to
354 discuss AMC regulations.

355

356 The board discussed and decided to add the following meetings to the board calendar:

357

358 Thursday, January 17, 2019 teleconference at 9:00 am.

359 Tuesday, March 19, 2019 teleconference at 9:00 am.

360 Thursday, May 16, 2019 teleconference and will discuss the annual report for FY 2020 and any
361 audit issues.

362 Friday, August 2, 2019 in Anchorage beginning at 9:00 am.

363

364 ***TASK: Supervisor Renee Hoffard to e-mail Claire Brooks confirming attendance at the***
365 ***08/02/2018 meeting.***

366 ***OLE Wiard to send e-mail to board members with all planned meeting dates and add the dates***
367 ***to the APR website.***

368

369 Sign Previous Meeting Minutes

370

371 The signature pages for the previous meeting minutes were not available and it was decided the
372 signature pages would be e-mailed to Chair Derry and returned via e-mail.

373

374 ***TASK: OLE Wiard to e-mail signature pages from 7/25/18 and 8/13/18 board meeting***
375 ***minutes to Chair Derry for completion.***

376

377 New Task List

378

379 There was discussion about updating the current task list and e-mailing to board upon
380 completion.

381

382 ***TASK: OLE Wiard to update current task list and e-mail to board once completed.***
383 ***Supervisor Renee Hoffard to check on pending applications. Will send e-mail to any board***
384 ***members that have not voted. In addition will check for course approvals.***

385

386 The board discussed having the new OLE and Investigator to take the full 15-hour USPAP
387 course. The 15-hour USPAP course is required as a pre-requisite for the Investigative training in
388 2019.

389

390 **In a motion made by Renee Piszczek, seconded by Robert Tracy, and passed unanimously,**
391 **it was RESOLVED to APPROVE the board pay for OLE Tracy Wiard and Investigator**
392 **Shyla Consalo to attend the 15-hour online USPAP course.**

393

394 **In a motion made by Wendy Lawrence, it was RESOLVED to ADJOURN.**

395
396 Hearing nothing further, Chair Derry adjourned the meeting at 2:47 p.m.
397

398 Respectfully Submitted,
399

400
401 _____ Date _____
402 Tracy Wiard, Licensing Examiner

403
404
405 _____ Date _____
406 David Derry, Chair

DRAFT

Board Business

Continuing Education Consent Agreements

EXECUTIVE SESSION MOTION

I, _____, move that the Alaska State Board of Certified Real Estate Appraisers enter into executive session in accordance with AS 44.62.310(c), and Alaska Constitutional Right to Privacy Provisions, for the purpose of discussing _____

Board staff to remain during the session.

Off record: _____

On record: _____

Authority: AS 44.62.310(c), Government meetings public

The following subjects may be considered in executive session:

- **matters, the immediate knowledge of which would clearly have an adverse effect upon the finances of the public entity;**
- **subjects that tend to prejudice the reputation and character of any person, provided the person may request a public discussion;**
- **matters which by law, municipal charter, or ordinance are required to be confidential;**
- **matters involving consideration of government records that by law are not subject to public disclosure.**

Investigative Case Reviews & Probation Report

EXECUTIVE SESSION MOTION

I, _____, move that the Alaska State Board of Certified Real Estate Appraisers enter into executive session in accordance with AS 44.62.310(c), and Alaska Constitutional Right to Privacy Provisions, for the purpose of discussing _____

Board staff to remain during the session.

Off record: _____

On record: _____

Authority: AS 44.62.310(c), Government meetings public

The following subjects may be considered in executive session:

- **matters, the immediate knowledge of which would clearly have an adverse effect upon the finances of the public entity;**
- **subjects that tend to prejudice the reputation and character of any person, provided the person may request a public discussion;**
- **matters which by law, municipal charter, or ordinance are required to be confidential;**
- **matters involving consideration of government records that by law are not subject to public disclosure.**

Division Update & Financial Report

Department of Commerce Community, and Economic Development
Corporations, Business and Professional Licensing

Board of Certified Real Estate Appraisers
Schedule of Revenues and Expenditures

	FY 12	FY 13	FY 14	FY 15	FY16	FY17	FY18
Licensing Revenue	\$ 42,190	\$ 269,948	\$ 56,250	\$ 279,525	\$ 49,440	\$ 272,590	\$ 76,010
Allowable Third Party Reimbursement	-	-	1,499	-	-	5,827	\$ 1,534
Total Revenue	<u>42,190</u>	<u>269,948</u>	<u>57,749</u>	<u>279,525</u>	<u>49,440</u>	<u>278,417</u>	<u>77,544</u>
Direct Expenditures							
Personal Services	78,181	46,148	34,915	53,294	44,158	33,252	70,136
Travel	8,534	3,759	2,920	2,217	12,596	13,106	16,384
Contractual	56,720	44,699	14,955	33,616	3,008	5,288	11,180
Supplies	233	61	24	42	22	13	716
Equipment	-	-	-	-	-	-	-
Total Direct Expenditures	<u>143,668</u>	<u>94,667</u>	<u>52,814</u>	<u>89,169</u>	<u>59,784</u>	<u>51,659</u>	<u>98,416</u>
Indirect Expenditures*	15,739	18,583	20,937	33,105	21,626	18,550	36,827
Total Expenses	<u>159,407</u>	<u>113,250</u>	<u>73,751</u>	<u>122,274</u>	<u>81,410</u>	<u>70,209</u>	<u>135,243</u>
Annual Surplus (Deficit)	<u>(117,217)</u>	<u>156,698</u>	<u>(16,002)</u>	<u>157,251</u>	<u>(31,970)</u>	<u>208,208</u>	<u>(57,699)</u>
Beginning Cumulative Surplus (Deficit)	17,823	(99,394)	57,304	41,302	198,553	166,583	374,791
Ending Cumulative Surplus (Deficit)	<u>\$ (99,394)</u>	<u>\$ 57,304</u>	<u>\$ 41,302</u>	<u>\$ 198,553</u>	<u>\$ 166,583</u>	<u>\$ 374,791</u>	<u>\$ 317,092</u>

The 4th quarter board reports reflect the current year's actual indirect expenses allocated to the boards.

Appropriation	(All)
Activity Code	APR1

Sum of Expenditures Row Labels	Column Labels			
	1000 - Personal Services	2000 - Travel	3000 - Services	4000 - Commodi ties
1011 - Regular Compensation	28,778.04			
1023 - Leave Taken	2,487.16			
1028 - Alaska Supplemental Benefit	1,921.01			
1029 - Public Employee's Retirement System Defined Benefits	175.04			
1030 - Public Employee's Retirement System Defined Contribution	1,572.42			
1034 - Public Employee's Retirement System Defined Cont Health Reim	1,191.50			
1035 - Public Employee's Retirement Sys Defined Cont Retiree Medical	313.57			
1037 - Public Employee's Retirement Sys Defined Benefit Unfnd Liab	3,625.46			
1039 - Unemployment Insurance	83.87			
1040 - Group Health Insurance	10,155.07			
1041 - Basic Life and Travel	16.09			
1042 - Worker's Compensation Insurance	299.93			
1047 - Leave Cash In Employer Charge	721.88			
1048 - Terminal Leave Employer Charge	398.65			
1053 - Medicare Tax	430.98			
1069 - SU Business Leave Bank Contributions	10.91			
1077 - ASEA Legal Trust	49.05			
1079 - ASEA Injury Leave Usage	1.77			
1080 - SU Legal Trst	13.73			
1970 - Personal Services Transfer	17,889.78			
2000 - In-State Employee Airfare		1,702.58		
2001 - In-State Employee Surface Transportation		97.64		
2002 - In-State Employee Lodging		675.00		
2003 - In-State Employee Meals and Incidentals		457.00		
2005 - In-State Non-Employee Airfare		281.08		
2007 - In-State Non-Employee Lodging		298.00		
2008 - In-State Non-Employee Meals and Incidentals		270.00		
2009 - In-State Non-Employee Taxable Per Diem		154.00		
2010 - In-State Non-Employee Non-Taxable Reimbursement		658.37		
2012 - Out-State Employee Airfare		5,271.35		
2013 - Out-State Employee Surface Transportation		219.86		
2014 - Out-State Employee Lodging		3,718.14		
2015 - Out-State Employee Meals and Incidentals		1,176.00		
2017 - Out-State Non-Employee Airfare		402.66		
2020 - Out-State Non-Employee Meals and Incidentals		259.00		
2022 - Out-State Non-Employee Non-Taxable Reimbursement		728.44		
2036 - Cash Advance Fee		15.34		
2970 - Travel Cost Transfer		-		
3000 - Training/Conferences			2,954.90	
3002 - Memberships			450.00	
3023 - Expert Witness			3,484.50	
3044 - Courier			10.63	
3045 - Postage			99.25	
3046 - Advertising			636.55	
3057 - Structure, Infrastructure and Land - Rentals/Leases			83.13	
3067 - Honorariums/Stipend			16.00	
3069 - Commission Sales			129.00	
3088 - Inter-Agency Legal			2,817.09	
3094 - Inter-Agency Hearing/Mediation			216.70	
4000 - Books and Educational Supplies				585.00
4002 - Business Supplies				104.63
4003 - Information Technology Equipment				26.00
3085 - Inter-Agency Mail			282.00	
Grand Total	70,135.91	16,384.46	11,179.75	715.63

DIVISION INDIRECT EXPENSES		Total	Prof Lic	Corp & Bus Lic
Percentage of direct personal services:				
Business Supplies	21,186		20,259	927
Office Equipment	82,223	**	73,972	8,251
State Vehicles	4,908		4,458	450
Storage and Archives	7,130		7,127	3
Legal Support	21,233		21,233	-
Mail postage	19,962		33,034	(13,072)
Software Licensing and Maintenance	54,275	***	53,533	742
Division coding adjustment - conversion				
Division Administrative Expenses - all other	354,300		350,369	3,931
Division allocated by percentage of direct personal services:	565,217		563,985	1,232
Percentage of board licenses/total licensees:				
Division supervisors of receiving Personal Services 75%	143,358	****	129,022	14,336
Receiving Personal Services 40%	333,326	****	299,993	33,333
Investigations indirect Personal Services	391,513	*****	362,108	29,405
Division Administration Personal Services	511,173		462,870	48,303
Professional License Administration Personal Services	131,941		219,324	(87,383)
Division allocated by percentage of board licenses/total licensees:	1,511,311		1,473,317	37,994
Receiving personal services by transaction %:				
Division supervisors of receiving Personal Services 25%	47,786	****	24,251	23,535
Receiving Personal Services 60%	499,988	****	253,744	246,244
Division receiving personal services by transaction %:	547,774		277,995	269,779
Total Division Indirect Expenses	2,624,302		2,315,297	309,005
DEPARTMENT INDIRECT EXPENSES				
Percentage of direct personal services:				
Commissioner's Office	201,103		180,993	20,110
Administrative Services - Director's Office	60,198		54,178	6,020
Administrative Services - Human Resources	69,920		62,928	6,992
Administrative Services - Fiscal	84,892		76,403	8,489
Administrative Services - Budget	56,286		50,657	5,629
Administrative Services - Information Technology	146,370		131,733	14,637
Administrative Services - Information Technology - Network & Database	147,192		132,473	14,719
Administrative Services - Mail postage	8,704		7,834	870
Administrative Services - Facilities - Maintenance	9,772		8,795	977
Department allocated by percentage of direct personal services:	784,437		705,994	78,443
Percentage of board licenses/total licensees:				
Department administrative services support: Fiscal, IT, Procurement	595,969	*	525,705	70,264
Receiving personal services by transaction %:				
Department Personal Services - Fiscal Revenue personal services by transaction %	91,774		82,596	9,178
Total DEPARTMENT INDIRECT EXPENSES	1,472,180	****	1,314,295	157,885
STATEWIDE INDIRECT EXPENSES				
Percentage of direct personal services:				
Accounting and Payroll Systems	16,397		14,757	1,640
State Owned Building Rental (Building Leases)	303,308	*****	272,977	30,331
Human Resources	63,573		57,216	6,357
IT Non-Telecommunications	75,572	*****	68,015	7,557
IT Telecommunications	128,543	*****	115,689	12,854
Risk Management	1,890		1,701	189
Statewide allocated by percentage of direct personal services:	589,283		530,355	58,928
FY18 TOTALS BY METHODOLOGY				
Percentage of direct personal services:	1,938,937		1,800,334	138,603
Percentage of board licenses/total licensees:	2,107,280		1,999,022	108,258
Receiving personal services by transaction %:	639,548		360,591	278,957
Grand Total	4,685,765		4,159,947	525,818

Regulations Review

AQB & AMC Draft Regulations Review & Approval

What SB 155 requires-

- Registration of real estate management companies- new license type, establish standards and procedures for registration
AK Board: As specified in the Statute; this will include application, fees, documentation to verify all issues required. Verification by State staff of each of the required items. Then consideration/ approval by the Board. 08.87.135.
- 08.87.020(a)-Establish standards for real estate appraisal management company's appraiser panel, including size and member qualifications
AK Board: Follow Federal ASC requirement:
 - 15 or more appraisers registered in AK; or 25 or more nationally in 2 or more states.
 - State credentialed, follow USPAP, and have necessary geographic competency for the market area for where the work is performed.
- Report relevant information and disciplinary actions reported to the federal Appraisal Subcommittee
AK Board: See Section C, Policy Stmt. 9, ASC Final Revised Policy Statements, 3-2018; pg. 43. **It is unclear if the board wants a regulation for this, or is the statute enough.**
- 08.87.020(b)- The board may examine records of the company, require the company to submit reports, information and documents to the board, investigate violations of this chapter, conduct background investigations
AK Board: The board wants to maintain the authority to perform the steps listed (steps 1-4), as needed, and as part of the bi-annual renewal. For more specifics, refer to Oregon regs; Chapter 161-560-0010, 161-560-0020 & 161-570-0010 (Duty to cooperate). **It is unclear from the information the board provided if the board would like regulations.**
- 08.87.130- Registration required for a person as a real estate AMC
AK Board: In this case, "person" and company are considered synonymous; details are specified.
- 08.87.135(a)- Registration required for a company as a real estate AMC, must have a designated controlling person who is the main point of contact meeting certain requirements, must have a registered agent in Alaska if the company is not in Alaska, requires an appraiser to meet the Uniform Standards of Professional Appraisal Practice, engages only appraisers who are certified by the state, has a process to verify the person assigned to serve on the panel is certified and qualified under to conduct federally related transactions
AK Board: All items that are required for application for registration in AK. And should be listed/ included on the application. The "Controlling Person" must be a credentialed appraiser, in good standing.
- May not be owned in part or whole by a person that has had a certificate to act as a real estate appraiser denied, cancelled, suspended, revoked, etc., unless the person has had the certificate reinstated

AK Board: In conformance with ASC Final Revised Policy Stmts., 3-2018; Policy Stmt. 8, 2, A, pg. 39. It is unclear what this means for the regulations specialist.

- Posted a surety bond no greater than \$50,000, set by the board in regulations

AK Board: Provide confirmation/evidence of the bond in the amount of \$50K.

- Owned by persons meeting the requirements in (c) of this section

AK Board: Requires to be disclosed as part of the initial application process and on each subsequent renewal or any changes in ownership.

- 08.87.135(b)- a controlling person designated under (a) must be actively certified in a state as a real estate appraiser at all times, may not have had a certificate denied, canceled, suspended, revoked, put on probation, or surrendered in lieu of a pending revocation in any state unless the person has later had the certificate to act as a real estate appraiser granted or reinstated, and must be of good moral character

AK Board: Yes, as written. Any changes in the designated Controlling Person, must be reported to the state (AK) within 30 days of such change.

- 08.87.135(d)- the board shall provide a copy of a registration under this section to the Appraisal Subcommittee established under federal law on a form approved by the subcommittee

AK Board: Per the ASC Final Revised Policy Stmts. 3-2018; this is reported electronically to the ASC. Policy Stmt. 9, C & D, pg. 43.

- 08.87.140- mandatory reporting by an AMC to the Appraisal Subcommittee of a real estate appraiser that has failed to comply with the Uniform Standards of Professional Appraisal Practice under federal law in a manner that materially affects a valuation appraisal

AK Board: Follow as specified in the statute.

- 08.87.142- An AMC reporting to a borrower shall separately state fees paid to an appraiser for the appraisal, and the fee charged to the borrower for the appraisal by the AMC.

AK Board: -The appraiser contracted by the AMC will report in the appraisal report the fee paid to him/her by the AMC.

- 08.87.145- retention of records and inspection by the board

AK Board: Oregon regs-161-550-0020; Maintain records 5 yrs.; etc.

Was the board's intent to make a regulation for this, it is unclear as to what the direction is for the regulation specialist.

- 08.87.150- Reporting requirements for federally regulated AMCs- annual submission to the board of information that the board is required to submit to the Appraisal Subcommittee including: report of intent to operate in the state, and disclosure of whether the company is directly or indirectly owned in whole or in part by any person that has had a certificate to act as a real estate appraiser denied, cancelled, suspended, revoked, put on probation, or surrendered in lieu of a pending revocation in any state.

AK Board: As specified in the Statute; federally regulated AMCs are not subject to Alaska regulation, but must provide the information as detailed in the statute.

- 08.87.155- exemptions, outlines who is exempt

AK Board: As specified in the Statute; clearly delineated and specific.

- 08.87.215- prohibited practices

AK Board: As specified in the Statute.

- 08.87.220- disciplinary proceedings; outlines disciplinary action under AS 08.01.075. May also suspend or revoke a registration for an AMC if the company has ceased to operate in the state as an AMC under (5).

AK Board: As specified in the Statute.

- 08.87.900- new definitions.

AK Board: See Appendix B, Glossary of Terms, ASC Final Revised Policy Statements, 3-2018; pg. 59.

The act takes effect January 1, 2019, but the board may not enforce registration of the AMC until March 1, 2019.

What regulations will be needed- a new section for each,

1. Application instructions for a company owning an AMC- new section outlining application instructions and qualifications, and a copy of bond. This should include an individual as described in 08.87.130.
2. Definition of good moral character, and who must be of good moral character
3. Bonding requirements set in regulation by the board no greater than \$50,000
4. Renewal requirements- Must meet the requirements in 08.87.135(a) through (c)- includes background investigation, proof of bonding, designated controlling person, registered agent if required under (a)(2), etc.
5. Reporting requirements, annually by board. What will the AMC be required to submit annually? Possibly a form the AMC completes on an annual basis and submits to the board.
6. Standards for AMC panel and qualifications of members

AK Board subcommittee; 8/8/18

D. Derry

R. Tracy

R. Piszczek

Chapter 70. Board of Certified Real Estate Appraisers.

(Words in **boldface and underlined** indicate language being added; words [CAPITALIZED AND BRACKETED] indicate language being deleted. Complete new sections are not in boldface or underlined.)

12 AAC 70.108(a) is amended to read:

(a) An applicant for certification as a general real estate appraiser shall submit verification of 3,000 hours of appraisal work obtained continuously over a period of not less than **18** [30] months. At least 1,500 hours of the appraisal work must be in nonresidential appraisal work. The board will only accept work experience that was obtained after January 30, 1989 and was performed in compliance with [STANDARD 1 AND STANDARD 2 OF] the Uniform Standards of Professional Appraisal Practice (USPAP) in effect at the time that the work experience was obtained.

12 AAC 70.108(b) is amended to read:

(b) An applicant for certification as a residential real estate appraiser shall submit verification of **1,500** [2,500] hours of appraisal experience obtained continuously over a period of not less than **12** [24] months. The board will only accept work experience that was obtained after January 30, 1989 and was performed in compliance with [STANDARD 1 AND STANDARD 2 OF] the USPAP in effect at the time that the work experience was obtained. (Eff. 12/13/94, Register 133; am 2/13/2002, Register 161; am 4/16/2004, Register 170; am 5/24/2007, Register 182; am 9/14/2012, Register 203; am ____/____/____, Register ____)

Authority: AS 08.87.020

The next section was not discussed at the meeting, but included in Ms. Lawrence's draft. Does

the board want to keep the changes to (b) as drafted by Ms. Lawrence in this project?

The lead in language of 12 AAC 70.115(b) is amended to read;

(b) An applicant for the Appraiser Qualification Board approved examination for certification as a general real estate appraiser shall document satisfactory completion of 300 creditable classroom hours as specified in the following core curriculum[, OF WHICH AT LEAST 150 HOURS MUST BE COMPLETED NOT LATER THAN THE FIVE YEARS IMMEDIATELY PRECEDING THE DATE OF A COMPLETE APPLICATION]:

12 AAC 70.115(b)(10) is amended to read;

(10) appraisal subject matter electives, 30 hours, **and may include hours over the minimum of the course topics required under this subsection.**

12 AAC 70.115(c) is amended to read;

(c) An applicant for certification as a residential real estate appraiser must document satisfactory completion of 200 creditable classroom hours of instruction that meet the requirements in 12 AAC 70.140 with emphasis on appraisal of residential properties, and a bachelor's degree or higher in any field from an accredited college or university, **or possession of an associate's degree in a field of study related to business administration, accounting, finance, economics, or real estate, or successful completion of 30 semester hours of college level courses or the College-Level Examination Program (CLEP) examination in the following specific topics;**

(1) English composition;

(2) microeconomics;

(3) macroeconomics;

(4) finance;

(5) algebra, geometry, or higher mathematics;

(6) computer science;

(7) business or real estate law;

(8) two elective courses in any of the above topics or accounting, geography, agriculture economics, business management, or real estate.

The lead in language of 12 AAC 70.115(d) is amended to read:

(d) An applicant for the Appraiser Qualification Board examination for certification as a residential real estate appraiser shall document satisfactory completion of 200 creditable classroom hours as specified in the following core curriculum[, OF WHICH AT LEAST 100 HOURS MUST BE COMPLETED NOT LATER THAN THE FIVE YEARS IMMEDIATELY PRECEDING THE DATE OF A COMPLETE APPLICATION]:

12 AAC 70.115(d)(10) is amended to read;

(10) appraisal subject matter electives, 20 hours, **and may include hours over the minimum of the course topics required under this subsection.**

(Eff. 12/13/94, Register 133; am 4/16/2004, Register 170; am 1/16/2005, Register 173; am 5/24/2007, Register 182; am 9/14/2012, Register 203; am 6/28/2015, Register 214; am ____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.110

12 AAC 70.140(c) is amended to read;

(c) An applicant's classroom hours of education for certification as a general or residential real estate appraiser must include coverage of all topics listed in the applicable Appraiser Qualification Criteria developed by the Appraiser Qualifications Board of the Appraisal Foundation, *The Real Property Appraiser Qualification Criteria* effective **May 1, 2018** [JANUARY 1, 2015], and adopted by reference.

(Eff. 7/16/92, Register 123; am 4/15/94, Register 130; am 12/13/94, Register 133; am 6/13/97, Register 142; am 6/5/98, Register 146; am 4/16/2004, Register 170; am 1/16/2005, Register 173; am 5/24/2007, Register 182; am 9/14/2012, Register 203; am 6/28/2015, Register 214; am 10/18/2017, Register 224; am ____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.110 AS 08.87.310

12 AAC 70 is amended by adding a new section to read;

12 AAC 70.160. Real estate appraisal management company registration. (a) An applicant for registration as a real estate appraisal management company shall submit

(1) a complete notarized application on a form approved by the board and provided by the department that includes

(A) the names and addresses of all owners of the company, including natural persons or entities;

(B) the name of the registered agent if applicable under AS 08.87.135(a)(2);

(C) a list of all certified appraisers performing appraisals;

(D) a list of all states in which the appraisal management company performs appraisals;

(E) the name of the controlling person and evidence satisfactory to the board the controlling person

(i) has an active real estate appraiser certificate in good standing in a state;

(ii) has not had a real estate appraiser certificate denied, cancelled, suspended, revoked, put on probation, or surrendered in accordance with AS 08.87.135(b)(2);

(iii) is of good moral character; and

(F) certification the

(i) appraisers on the appraiser panel are in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP) and are qualified to conduct federally related transactions under federal law;

(ii) owners are in compliance with (b) of this section; and

(iii) appraisals are conducted independently and free from inappropriate influence and coercion as required by AS 08.87.135(a)(6);

(2) the applicable fees required in 12 AAC 02.370; and

(3) a copy of a surety bond in the amount of \$50,000.

(b) A person who owns more than 10 percent of a real estate management company must be of good moral character as defined in this section, and may not have had a real estate appraiser certificate denied, cancelled, suspended, revoked, put on probation, or surrendered in accordance with AS 08.87.135(a)(7).

(c) “Good moral character” under this section is defined as a personal history of honesty, fairness, and respect for the rights of others and for state and federal law. A person applying for a registration is ineligible for registration due to failure to satisfy the requirement of good moral character if

(1) there is substantial connection between the lack of good moral character of the person and the professional responsibilities of an appraiser, a controlling person, or owner of an appraisal management company; and

(2) the finding by the board of lack of good moral character is supported by clear and convincing evidence.

(Eff. ____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.130 AS 08.87.135

12 AAC 70 is amended by adding a new section to read;

12 AAC 70.162. Real estate appraisal management company and panel standards.

On or after March 1, 2019, a real estate appraisal management company shall

(1) be registered in this state if the appraisal management company oversees a panel of more than 15 appraisers certified in this state, or 25 or more appraisers certified in two or more states within a 12 month period;

(2) have a process in place to verify all appraisers are certified by the state and in good standing, and have geographic competency for the market area in which the appraisal is performed; and

(3) report to the board within 30 days of a change of the designated controlling person on a form provided by the department, and submit evidence satisfactory to the board of

Register _____, _____ 2019 PROFESSIONAL REGULATIONS

meeting the requirements of 12 AAC 70.160(a)(1)(E). (Eff. ____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.130 AS 08.87.135

12 AAC 70 is amended by adding a new section to read;

12 AAC 70.165. Renewal of an appraisal management company registration. A

registered appraisal management company applying for renewal of a registration must submit

- (1) a completed renewal application, on a form provided by the department that includes the information described in 12 AAC 70.160(a)(1);
- (2) the renewal fee established in 12 AAC 02.370; and
- (3) proof of current bonding as described in 12 AAC 70.160(a)(3).

(Eff. ____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.130 AS 08.87.135

Need a date in here, such as by June 30th.

12 AAC 70 is amended by adding a new section to read;

12 AAC 70.167. Annual registration requirements for registered appraisal

management companies. A registered appraisal management company must register annually on a form provided by the department and pay the fee under 12 AAC 02.370 for each appraiser performing appraisals for federally related transactions within the previous 12 months. (Eff.

____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.130 AS 08.87.135

12 AAC 70 is amended by adding a new section to read;

12 AAC 70.170. Annual reporting requirements for federally regulated appraisal management companies. Federally regulated appraisal management companies shall report annually to the board information required by AS 08.87.150 on a form provided by the department. (Eff. ____/____/____, Register _____)

Authority: AS 08.87.020 AS 08.87.150

12 AAC 70.990(1) is amended to read;

(1) “appraisal experience” includes fee and staff appraisals, ad valorem tax appraisals, appraisal reviews, appraisal analysis, real estate counseling, and feasibility analysis and study, all of which must have been performed in accordance with [STANDARD 1 AND STANDARD 2 OF] the *Uniform Standards of Professional Appraisal Practices* described in 12 AAC 70.900;

(Eff. 7/16/92, Register 123; am 4/15/94, Register 130; am 12/13/94, Register 133; am 6/5/98, Register 146; am 5/24/2007, Register 182; am 9/14/2012, Register 203; am ____/____/____, Register _____)

Authority: AS 08.87.020

AMC Fee Calculation Regulations

Draft

AMC Fee Calculation
Chambers, 11/5/2018

Notes:

Fees required in regulation

- AMC Alaska registry fee under AS 08.01.065(a)
- AMC federal registry fee under AS 08.01.065(j)

Non-Federally Regulated AMCs

- Only for AMCs on the national registry
- May be assessed on a multi-year basis but has to be submitted to ASC annually.
- AMCs operating more than one year: \$25 x # of panel appraisers in a 12-month period
- AMCs operating less than one year: \$25 x # panel appraisers used since doing business
- 12 months can be a calendar year or the 12 months preceding the fee calculation.
- Fee is calculated by number of appraisers, not transactions.
- Recommend the fee calculation period be the 12 months prior to renewal, then calculated and remitted at renewal.

Federally Regulated AMCs: Subject to minimum state rules & reporting; subject to registry fee

*****DRAFT FEE REGULATIONS*****

12 AAC 02.370. BOARD OF CERTIFIED REAL ESTATE APPRAISERS.

(b) The following fees are established for appraisal management companies:

(1) nonrefundable application fee for initial registration, \$500;

(2) registration fee for all or part of the initial annual registration period, \$350;

(3) change in controlling person, employee, director, officer, or agent, \$250;

(4) annual federal registry fee of \$25 per the number of panel appraisers performing one or more transactions in the preceding 12-month period.

If renewal is June 30:

12 AAC 70.167. Annual registration requirements for registered appraisal management companies. A registered appraisal management company must register annually on a form provided by the department and pay the fee under 12 AAC 02.370 for each appraiser performing appraisals for federally related transactions in the 12 months preceding the company's application for renewal. (Eff. ____/____/____, Register ____)

If renewal is Feb 28:

12 AAC 70.167. Annual registration requirements for registered appraisal management companies. A registered appraisal management company must register annually on a form provided by the department and pay the fee under 12 AAC 02.370 for each appraiser performing appraisals for federally related transactions in the calendar year preceding the company's application for renewal. (Eff. ____/____/____, Register ____)

Public Comment

Old Business



THE STATE
of **ALASKA**
GOVERNOR BILL WALKER

**Department of Commerce, Community,
and Economic Development**

BOARD OF CERTIFIED REAL ESTATE APPRAISERS

P.O. Box 110806
Juneau, AK 99811-0806
Main: 907.465.5470
Fax: 907.465.297

November 2, 2018

To the Board of Certified Real Estate Appraisers:

I would like to start by thanking the board for approving myself and Chair David Derry to attend the 2018 Fall AARO conference in Washington, DC. I found the conference to be highly informative and valuable for providing information regarding appraisal regulation and oversight. As the new occupational licensing examiner for the Board of Certified Real Estate Appraisers, this conference has helped close some of the gaps in my knowledge between the State of Alaska regulations and the federal bodies that govern the requirements of Certified Real Estate Appraisers.

The information was substantial and I have summarized the points I feel would be of interest to the board. AARO will have a new facelift to their website in the spring of 2019. The annual AARO membership fee structure has been changed. Because of this change, membership fees in Alaska will be reduced. The new fee structure shall be based on the number of licensees per state as opposed to a flat rate. Alaska will fall into the medium (2) category so our state fees will be \$350.00. This fee is \$100.00 less than previous fees.

There was discussion about continuing education and the possibility of reciprocity for CE courses approved by TAF. TAF provided a list showing colleges that have real estate degrees through the AQB. There was also information regarding PAREA which will be the AQB online learning system for appraisers that is being developed. This can be used for CE requirements (consent agreements) as well as trainees looking to obtain appraisal experience through PAREA. John Brennan highlighted the value this will give appraisers looking to enter the field by limiting amount of hands on supervisory time required as well as providing valuable work experience to trainees coming to an organization.

The Federal Reserve Board increased the threshold for commercial real estate transactions from \$250,000.00 to \$500,000.00. The threshold for real estate secured business loans has remained unchanged at \$1,000,000.00. There was also a bit of discussion on exemptions for appraisals in rural areas on residential transactions less than \$400,000.00. Currently North Dakota has been issued an exemption due to the lack of certified appraisers in some of the rural areas of the state.

The second exposure draft of USPAP 2020/21 changes is underway. There are considerations to retire AO 4, 11, and 12. There are significant proposals to change standards 2, 8, and 10. There are proposals for some rewording regarding the disclosure obligations in the scope of work rule. There is a suggestion to remove the comment regarding perfection from standard rules 1-1, 3-1, 5-1, 7-1, and 9-1 and move it into the

Last Name

Date

Page 2

competency rule. There are some proposed modifications and additions to the definitions section as well as edits to the terms, “accept an assignment,” “at the time of the assignment,” and “intangible items.”

AMC’s were a huge topic of discussion at many sessions of the conference. Due to the number of state requesting extensions, no best practice model has been set up. Many of the states that are currently registering AMC’s have rolling renewals so they had no trouble with the fee structure for AMC approval and expiration dates. There will likely be more information on AMC regulation and implementation at the Spring 2019 AARO conference after ASB conducts more audits.

Bifurcated appraisals, AKA hybrid appraisals have been a topic of contention for some time. According to ASB, the bifurcated appraisals are USPAP compliant if the portions of the appraisals being outsourced are not completed by people holding out as appraisers. Fannie Mae does accept bifurcated appraisals. These appraisals have been sold to certified appraisers as an opportunity to provide more services to clients instead of a standard appraisal. However, appraisers have the final say since they are required to certify the report.

Once again, I thank the board for this wonderful opportunity to attend the Fall 2018 AARO conference. As a new licensing examiner for the Board of Certified Real Estate Appraisers, I believe this conference increased my knowledge in a way numerous hours of book study would have failed to provide. I was also able to meet many peers in the appraisal field and look forward to working with them as required.

Sincerely,

Tracy Wiard
Occupational Licensing Examiner

Task list

<u>TASK LIST</u>- September 24, 2018					
#	Task	Who to complete	When is the deadline?	Distribute to the Board?	Completed
1	Correct FAQ # 9 on APR website to state the Supervisory Appraiser/Trainee Appraiser Course is acceptable for CEU but not Qualifying Education.	Tracy	ASAP	No	10/15/2018
2	Add FAQ to APR website stating the Determination of Competency Form needs to be submitted well in advance of the trainee applying for an Appraisal License to make sure they are on file before the application is received.	Tracy	ASAP	No	10/25/2018
3	Send an e-mail to course sponsors to set guidelines for the course approval process to make sure the forms submitted matches AQB information. Send a copy of the e-mail to the board as well.	Tracy	ASAP	Yes	Still needs completion
4	Put meeting calendar for 2019 in November 19th board packet/agenda	Tracy	November meeting	November meeting	11/19/2018
5	Draft letter of support in reply to Mr. Safer's correspondence about barriers to licensure (Task 11 from May 2018 meeting)	Rob	COB 7/25/2018	Yes.	7/25/2018- sent revision 8/10/2018. Waiting for direction to e-mail it out.
6	Send Chair Derry a copy of the Board of Professional Counselors definitions of traditional classroom, synchronous classroom and distance education.	Tracy	ASAP	Yes	10/5/2018
7	Talk to people at the AARO conference to see if ASC has a set of definitions of traditional classroom, synchronous classroom and distance classroom.	David / Tracy	AARO Conference	November Meeting	10/22/2018

Task list

8	Review all applicants that have been approved since 1/1/18 to see who has taken the exams. Send updates and request work products as needed.	Renee / Tracy	ASAP	No	Still needs completion
9	E-mail new certification document to David Derry.	Renee	ASAP	No	9/25/2018
10	Find out the procedures for soliciting experts for the reviewing appraisal panel and whether public notice and approval are needed and report back to the board (Task 7 from May 2018 meeting)	Greg Francois	ASAP	September meeting	9/24/2018
11	Look into the possibility of changing the name of the form titled "Board Member Review" to "Board Member Screening" (Task 8 from May 2018 meeting)	Doug Fell	ASAP	September meeting	9/24/2018
12	Update FAQ on APR website to include new process regarding submission of work product samples being submitted before applicant takes the exam.	Tracy	ASAP	Yes	Still needs completion / double check with board to make sure I am clear.
13	Add in person meeting to Agenda for 8/2/19 meeting with ASC.	Tracy	2019	August 2019 Meeting	Have reminder set
14	Send e-mail to board with meeting dates for 2019 and add to APR website.	Tracy	ASAP	Yes	11/2/2018
15	E-mail signature pages to chair from 7/25/2018 meeting and 8/13/2018 meeting.	Tracy	ASAP	No	Sent to chair 9/26/18 - WEBSITE Updated 10/9/18
16	Add 2019 meetings to APR website	Tracy	ASAP		Sent e-mail and meetings request to Exec. Sec. on 10/25/18

STATE OF ALASKA 2019

State Holidays

Date	Holiday
01/01	New Year's Day
01/21	MLK Jr.'s Birthday
02/18	Presidents' Day
03/25	Seward's Day
05/27	Memorial Day
07/04	Independence Day
09/02	Labor Day
10/18	Alaska Day
11/11	Veterans' Day
11/28	Thanksgiving Day
12/25	Christmas Day

Biweekly employees please refer to appropriate collective bargaining unit agreement for more information regarding holidays.

 Holiday

APR Applications uploaded into On Board on the 15th Voting closes in On Board after 5pm after 5 business days.
APR Board Meetings.



State calendar maintained by the
 Division of Finance,
 Department of Administration
<http://doa.alaska.gov/calendars.html>
 Revised 08/28/2018

HOLIDAY CALENDAR

JANUARY

S	M	T	W	R	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

FEBRUARY

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MARCH

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31						

APRIL

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28	29	30				

MAY

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JUNE

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30						

JULY

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28	29	30	31			

AUGUST

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25	26	27	28	29	30	31

SEPTEMBER

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29	30					

OCTOBER

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27	28	29	30	31		

NOVEMBER

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17	18	19	20	21	22	23
24	25	26	27	28	29	30

DECEMBER

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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Administrative Business