



TELECONFERENCE/VIRTUAL MEETING
REAL ESTATE APPRAISERS BOARD
Room 121A, 1400 East Washington Avenue, Madison
Contact: Tom Ryan (608) 266-2112
February 13, 2018

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

- A) Adoption of Agenda (1-3)**
- B) Approval of Minutes of November 14, 2017 (4-5)**
- C) Administrative Updates (6-11)**
 - 1) Department and Staff Updates
 - 2) Election of Officers
 - 3) Appointment of Liaisons and Alternates
 - 4) Delegation of Authorities
 - 5) Board Members – Board Member Status
 - a) Carl Clementi – 5/1/2020
 - b) Jennifer Coates – 5/1/2019
 - c) Thomas Kneesel – 5/1/2018
 - d) Steven Miner – 5/1/2019
 - e) Dennis Myers – 5/1/2021
 - f) Lawrence Nicholson – 5/1/2018
- D) Conflicts of Interest**
- E) Act 113, Regarding Regulation of Appraisal Management Companies – Discussion and Consideration (12)**
 - 1) 9:00 A.M. APPEARANCE: Dean Smith, Stoughton, WI
- F) Credentialing Matters**
- G) Legislative/Administrative Rule Matters (13-15)**
 - 1) Position Statements of the Real Estate Appraisers Board
 - 2) Update on Legislation and Pending or Possible Rulemaking Projects
- H) Report from Real Estate Appraisers Application Advisory Committee**

I) Informational Items

J) Items Added After Preparation of Agenda:

- 1) Introductions, Announcements and Recognition
- 2) Nominations, Elections, and Appointments
- 3) Board Liaison Training and Appointment of Mentors
- 4) Administrative Updates
- 5) Education and Examination Matters
- 6) Credentialing Matters
- 7) Practice Matters
- 8) Legislation/Administrative Rule Matters
- 9) Liaison, Panel, and Committee Report(s)
- 10) Informational Item(s)
- 11) Disciplinary Matters
- 12) Presentations of Petition(s) for Summary Suspension
- 13) Presentation of Proposed Stipulation(s), Final Decision(s) and Order(s)
- 14) Presentation of Proposed Decisions
- 15) Presentation of Interim Order(s)
- 16) Petitions for Re-Hearing
- 17) Petitions for Assessments
- 18) Petitions to Vacate Order(s)
- 19) Petitions for Designation of Hearing Examiner
- 20) Requests for Disciplinary Proceeding Presentations
- 21) Motions
- 22) Petitions
- 23) Appearances from Requests Received or Renewed
- 24) Speaking Engagement(s), Travel, or Public Relation Request(s), and Reports

K) Public Comments

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (§ 19.85 (1) (a), Stats.); to consider licensure or certification of individuals (§ 19.85 (1) (b), Stats.); to consider closing disciplinary investigations with administrative warnings (§ 19.85 (1) (b), Stats. and § 440.205, Stats.); to consider individual histories or disciplinary data (§ 19.85 (1) (f), Stats.); and to confer with legal counsel (§ 19.85 (1) (g), Stats.).

L) Deliberation on Division of Legal Services and Compliance (DLSC) Matters

- 1) Administrative Warning(s)
- 2) Proposed Stipulation(s), Final Decisions and Orders
 - a) 16 APP 054 – Ronald J. Tallinger **(16-22)**
 - b) 17 APP 008 – James D. Dhein **(23-29)**
 - c) 17 APP 009 – Dan W. Berry **(30-35)**
 - d) 17 APP 018 – Brian P. Knowles **(36-41)**
 - e) 17 APP 023 – Daniel P. Currier **(42-47)**
- 3) Case Closings

M) Deliberation of Items Added After Preparation of the Agenda:

- 1) Education and Examination Matters
- 2) Credentialing Matters

- 3) Disciplinary Matters
- 4) Monitoring Matters
- 5) Professional Assistance Procedure (PAP) Matters
- 6) Board Liaison Training
- 7) Petition(s) for Summary Suspensions
- 8) Proposed Stipulations, Final Decisions and Orders
- 9) Administrative Warnings
- 10) Proposed Decisions
- 11) Matters Relating to Costs
- 12) Complaints
- 13) Case Closings
- 14) Case Status Report
- 15) Petition(s) for Extension of Time
- 16) Proposed Interim Orders
- 17) Petitions for Assessments and Evaluations
- 18) Petitions to Vacate Orders
- 19) Remedial Education Cases
- 20) Motions
- 21) Petitions for Re-Hearing
- 22) Appearances from Requests Received or Renewed

N) Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

O) Open Session Items Noticed Above not Completed in the Initial Open Session

P) Vote on Items Considered or Deliberated Upon in Closed Session, if Voting is Appropriate

ADJOURNMENT

NEXT SCHEDULED MEETING: JUNE 19, 2018

 MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held at 1400 East Washington Avenue, Madison, Wisconsin, unless otherwise noted. In order to confirm a meeting or to request a complete copy of the board's agenda, please call the listed contact person. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of disciplinary hearings may be changed by the examiner for the convenience of the parties. Interpreters for the hearing impaired provided upon request by contacting the Affirmative Action Officer, 608-266-2112.

**REAL ESTATE APPRAISERS BOARD
TELECONFERENCE/VIRTUAL MEETING MINUTES
November 14, 2017**

PRESENT: Carl Clementi, Jennifer Coates, Thomas Kneesel, Steven Miner (*arrived at 9:55 a.m.*), Dennis Myers (*in person*), Lawrence Nicholson

STAFF: Tom Ryan - Executive Director; Kimberly Wood – Program Assistant Supervisor-Adv., and other DSPS Staff

CALL TO ORDER

Lawrence Nicholson, Chair, called the meeting to order at 9:32 a.m. A quorum of five (5) members was confirmed.

ADOPTION OF AGENDA

MOTION: Thomas Kneesel moved, seconded by Dennis Myers, to adopt the agenda as published. Motion carried unanimously.

APPROVAL OF MINUTES

MOTION: Dennis Myers moved, seconded by Carl Clementi, to approve the minutes of August 8, 2017 as published. Motion carried unanimously.

(Steve Miner joined the meeting at 9:55 a.m.)

CREDENTIALING MATTERS

Application Matters: Standard 3 Review

MOTION: Thomas Kneesel moved, seconded by Steve Miner, to reiterate that pursuant to Wis. Stat. s. 458.085(2) and Wis. Admin. Code s SPS 85.700(1)(b), appraisal review work may be submitted as experience for applicants. The Real Estate Appraiser Application Advisory Committee may request information for standard 3 reviews as outlined in the document published in the Real Estate Appraiser Board’s 11/14/2017 meeting materials (pgs. 14-15). Motion carried unanimously.

CLOSED SESSION

MOTION: Jennifer Coates moved, seconded by Dennis Myers, to convene to Closed Session to deliberate on cases following hearing (§ 19.85(1) (a), Stats.); to consider licensure or certification of individuals (§ 19.85 (1) (b), Stats.); to consider closing disciplinary investigations with administrative warnings (§ 19.85 (1) (b), Stats. and § 440.205, Stats.); to consider individual histories or disciplinary data (§ 19.85 (1) (f), Stats.); and to confer with legal counsel (§ 19.85 (1) (g), Stats.). The Chair read the language of the motion aloud for the record. The vote of each member was ascertained by voice vote. Roll Call Vote: Carl Clementi–yes; Jennifer Coates–yes; Thomas Kneesel–yes; Steven Miner–yes; Dennis Myers–yes; Lawrence Nicholson–yes. Motion carried unanimously.

The Board convened into Closed Session at 10:17 a.m.

RECONVENE TO OPEN SESSION

MOTION: Carl Clementi moved, seconded by Jennifer Coates, to reconvene in Open Session. Motion carried unanimously.

The Board reconvened into Open Session at 10:26 a.m.

VOTE ON ITEMS CONSIDERED OR DELIBERATED UPON IN CLOSED SESSION, IF VOTING IS APPROPRIATE

MOTION: Jennifer Coates moved, seconded by Thomas Kneesel, to affirm all Motions made and Votes taken in Closed Session. Motion carried unanimously.

(Be advised that any recusals or abstentions reflected in the closed session motions stand for the purposes of the affirmation vote.)

DIVISION OF LEGAL SERVICES AND COMPLIANCE (DLSC) MATTERS

Administrative Warnings

17 APP 006

MOTION: Jennifer Coates moved, seconded by Dennis Myers, to issue an Administrative Warning in the matter of DLSC case number 17 APP 006. Motion carried unanimously.

Proposed Stipulations, Final Decisions and Orders

16 APP 056 - Steven J. Kontowicz

MOTION: Dennis Myers moved, seconded by Jennifer Coates, to adopt the Findings of Fact, Conclusions of Law, Stipulation and Order, in the matter of Steven J. Kontowicz case number 16 APP 056. Motion carried unanimously.

17 APP 003 & 17 APP 004 - Kurt M. Stammer

MOTION: Thomas Kneesel moved, seconded by Carl Clementi, to adopt the Findings of Fact, Conclusions of Law, Stipulation and Order, in the matter of Kurt M. Stammer DLSC case numbers 17 APP 003 & 17 APP 004. Motion carried unanimously.

17 APP 036 - Lynn M. Gregorash

MOTION: Dennis Myers moved, seconded by Jennifer Coates, to adopt the Findings of Fact, Conclusions of Law, Stipulation and Order, in the matter of Lynn M. Gregorash DLSC case number 17 APP 036. Motion carried unanimously.

ADJOURNMENT

MOTION: Thomas Kneesel moved, seconded by Carl Clementi, to adjourn the meeting. Motion carried unanimously.

The meeting adjourned at 10:27 a.m.

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Laura Smith, Bureau Assistant, on behalf of Thomas Ryan, Executive Director		2) Date When Request Submitted: 11/24/17 Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting	
3) Name of Board, Committee, Council, Sections: Real Estate Appraisers Board			
4) Meeting Date: 2/13/2018	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Administrative Matters/Updates 1) Election of Officers 2) Appointment of Liaisons and Alternates 3) Delegation of Authorities	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required: N/A	
10) Describe the issue and action that should be addressed: 1) The Board should conduct Election of its Officers for 2018 2) The new Chairperson should review and appoint/reappoint Liaisons and Alternates as appropriate 3) The Board should review and then consider continuation or modification of previously delegated authorities			
11) Authorization			
<i>Laura Smith</i>		11/24/2017	
Signature of person making this request		Date	
Supervisor (if required)		Date	
Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date			
Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.			

2017 Real Estate Appraisers

Election Results, Liaison Appointments, and Delegated Authorities

2017 OFFICERS	
Board Chair	Lawrence Nicholson
Vice Chair	Carl Clementi
Secretary	Steven Miner

Liaison Appointments

2017 LIAISON APPOINTMENTS	
Monitoring Liaison	Carl Clementi <i>Alternate: Steven Miner</i>
Continuing Education Liaison	Lawrence Nicholson <i>Alternate: Thomas Kneesel</i>
Credentialing Liaison	Carl Clementi; <i>Alternate: Thomas Kneesel</i>
DLSC Liaison	NONE
Education and Exams Liaison	Lawrence Nicholson <i>Alternate: Carl Clementi</i>
Legislative Liaison	Lawrence Nicholson <i>Alternate: Carl Clementi</i>
Travel Liaison	Lawrence Nicholson <i>Alternate: Carl Clementi</i>
Website Liaison	Jennifer Coates <i>Alternate: Dennis Myers</i>
Rules Liaison	Carl Clementi <i>Alternate: Thomas Kneesel</i>
Professional Assistance Procedure Liaison	Jennifer Coates <i>Alternate: Dennis Myers</i>
ASC and AQB Liaison	Carl Clementi <i>Alternate: Lawrence Nicholson</i>
REA Application Advisory Committee Chair	Thomas Kneesel <i>Alternate: Carl Clementi</i>
Screening Panel	NONE

MOTION: Dennis Myers moved, seconded by Thomas Kneesel, to affirm the Chair's appointment of Liaisons for 2017. Motion carried unanimously.

Delegation of Authority

Delegated Authority for Urgent Matters

MOTION: Dennis Myers moved, seconded by Jennifer Coates, that, in order to facilitate the completion of assignments between meetings, the Board delegates its authority by order of succession to the Chair, highest ranking officer, or longest serving member of the Board, to appoint liaisons to the Department to act in urgent matters, make appointments to vacant liaison, panel and committee positions, and to act when knowledge or experience in the profession is required to carry out the duties of the Board in accordance with the law. Motion carried unanimously.

Delegated Authority for Application Denial Reviews

MOTION: Dennis Myers moved, seconded by Jennifer Coates, that the Board counsel or another department attorney is formally authorized to serve as the Board's designee for purposes of Wis. Admin Code § SPS 1.08(1). Motion carried unanimously.

Document Signature Delegation

MOTION: Dennis Myers moved, seconded by Jennifer Coates, to delegate authority to the Chair or chief presiding officer, or longest serving member of the Board, by order of succession, to sign documents on behalf of the Board. In order to carry out duties of the Board, the Chair, chief presiding officer, or longest serving member of the Board, has the ability to delegate this signature authority for purposes of facilitating the completion of assignments during or between meetings. The Chair, chief presiding officer, or longest serving member of the Board delegates the authority to Executive Director or designee to sign the name of any Board member on documents as necessary and appropriate. Motion carried unanimously.

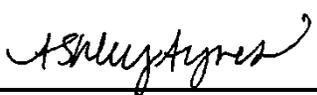
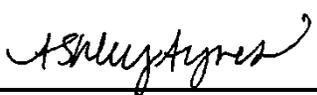
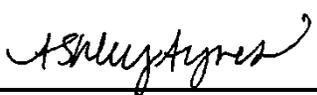
Monitoring Delegation

MOTION: Dennis Myers moved, seconded by Jennifer Coates, to adopt the 'Roles and Authorities Delegated to the Monitoring Liaison and Department Monitor' document as presented. Motion carried unanimously.

Travel Delegation

MOTION: Dennis Myers moved, seconded by Jennifer Coates, to authorize the travel liaison to approve all Board travel. Motion carried unanimously.

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Ashley Ayres Monitoring and Intake Supervisor Division of Legal Services and Compliance		2) Date When Request Submitted: December 18, 2017 Items will be considered late if submitted after 4:30 p.m. and less than: <ul style="list-style-type: none"> ▪ 10 work days before the meeting for Medical Board ▪ 14 work days before the meeting for all others 													
3) Name of Board, Committee, Council, Sections: Real Estate Appraisers Board															
4) Meeting Date: February 13, 2018	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Appointment of Monitoring Liaison and Delegated Authority Motion													
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both	8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes (Fill out Board Appearance Request) <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required:													
10) Describe the issue and action that should be addressed: Adopt or reject the Roles and Authorities Delegated to the Monitoring Liaison and Department Monitor document as presented in today's agenda packet.															
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; vertical-align: top;">11)</td> <td style="width: 60%; text-align: center; vertical-align: top;"> <div style="text-align: center;">  Authorization </div> </td> <td style="width: 30%; text-align: center; vertical-align: top;"> <div style="text-align: center;"> December 18, 2017 Date </div> </td> </tr> <tr> <td colspan="2" style="border-top: 1px solid black; border-bottom: 1px solid black;"> Signature of person making this request </td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"> Date </td> </tr> <tr> <td colspan="2" style="border-top: 1px solid black; border-bottom: 1px solid black;"> Supervisor (if required) </td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"> Date </td> </tr> <tr> <td colspan="2" style="border-top: 1px solid black; border-bottom: 1px solid black;"> Executive Director signature (indicates approval to add post agenda deadline item to agenda) </td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"> Date </td> </tr> </table>				11)	<div style="text-align: center;">  Authorization </div>	<div style="text-align: center;"> December 18, 2017 Date </div>	Signature of person making this request		Date	Supervisor (if required)		Date	Executive Director signature (indicates approval to add post agenda deadline item to agenda)		Date
11)	<div style="text-align: center;">  Authorization </div>	<div style="text-align: center;"> December 18, 2017 Date </div>													
Signature of person making this request		Date													
Supervisor (if required)		Date													
Executive Director signature (indicates approval to add post agenda deadline item to agenda)		Date													
Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, Provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.															

Roles and Authorities Delegated to the Monitoring Liaison and Department Monitor

The Monitoring Liaison (“Liaison”) is a Board/Section designee who works with department monitors to enforce Board/Section orders as explained below.

Current Authorities Delegated to the Monitoring Liaison

The Liaison may take the following actions on behalf of the Board/Section:

1. Grant a temporary reduction in random drug screen frequency upon Respondent’s request if he/she is unemployed and is otherwise compliant with Board/Section order. The temporary reduction will be in effect until Respondent secures employment in the profession. The Department Monitor (“Monitor”) will draft an order and sign on behalf of the Liaison.
2. Grant a stay of suspension if Respondent is eligible per the Board/Section order. The Monitor will draft an order and sign on behalf of the Liaison.
3. Remove the stay of suspension if there are repeated violations or a substantial violation of the Board/Section order. In conjunction with removal of any stay of suspension, the Liaison may prohibit Respondent from seeking reinstatement of the stay for a specified period of time. The Monitor will draft an order and sign on behalf of the Liaison.
4. Grant or deny approval when Respondent proposes continuing/remedial education courses, treatment providers, mentors, supervisors, change of employment, etc. unless the order specifically requires full-Board/Section approval.
5. Grant a maximum of one 90-day extension, if warranted and requested in writing by Respondent, to complete Board/Section-ordered continuing education.
6. Grant a maximum of one extension or payment plan for proceeding costs and/or forfeitures if warranted and requested in writing by Respondent.
7. Grant full reinstatement of licensure if Respondent has fully complied with all terms of the order without deviation. The Monitor will draft an order and obtain the signature or written authorization from the Liaison.
8. Grant or deny a request to appear before the Board/Section in closed session.
9. (*Except Pharmacy*) Accept Respondent’s written request to surrender credential. If accepted by the Liaison, Monitor will consult with Board Counsel to determine if a stipulation is necessary. If a stipulation is not necessary, Monitor will draft an order and sign on behalf of the Liaison. If denied by the Liaison, the request to surrender credential will go to the full Board for review.
10. (*Except Pharmacy*) Grant Respondent’s petition for a reduction in drug screens per the standard schedule, below. If approved, Monitor will draft an order and sign on behalf of the Liaison.
 - a. Year 1: 49 screens (including 1 hair test, if required by original order)
 - b. Year 2: 36 screens (plus 1 hair test, if required by original order)
 - c. Year 3: 28 screens plus 1 hair test
 - d. Year 4: 28 screens plus 1 hair test
 - e. Year 5: 14 screens plus 1 hair test
11. (*Dentistry only*) – Ability to approve or deny all requests from a respondent.

Current Authorities Delegated to the Department Monitor

The Monitor may take the following actions on behalf of the Board/Section, draft an order and sign:

1. Grant full reinstatement of licensure if CE is the sole condition of the limitation and Respondent has submitted the required proof of completion for approved courses.
 2. Suspend the license if Respondent has not completed Board/Section-ordered CE and/or paid costs and forfeitures within the time specified by the Board/Section order. The Monitor may remove the suspension and issue an order when proof completion and/or payment have been received.
 3. Suspend the license (or remove stay of suspension) if Respondent fails to enroll and participate in an Approved Program for drug and alcohol testing within 30 days of the order, or if Respondent ceases participation in the Approved Program without Board approval. This delegated authority only pertains to respondents who must comply with drug and/or alcohol testing requirements.
-

Proposed (New) Delegations to the Monitoring Liaison

The Monitoring Unit is proposing the following additions to the Monitoring Liaison's authority:

1. Board Monitoring Liaison may determine whether Respondent's petition is eligible for consideration by the full Board/Section.
2. Board Monitoring Liaison may approve or deny Respondent's request to be excused from drug and alcohol testing for work, travel, etc.

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Dean Smith, Certified Residential Appraiser		2) Date When Request Submitted: 1/24/2018 Items will be considered late if submitted after 4:30 p.m. and less than: <ul style="list-style-type: none"> ▪ 10 work days before the meeting for Medical Board ▪ 14 work days before the meeting for all others 	
3) Name of Board, Committee, Council, Sections: Real Estate Appraisers Board			
4) Meeting Date: 2/13/2018	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Act 113, Regarding Regulation of Appraisal Management Companies <ul style="list-style-type: none"> • APPEARANCE – Dean Smith, Stoughton, WI 	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both	8) Is an appearance before the Board being scheduled? If yes, who is appearing? Yes	9) Name of Case Advisor(s), if required:	
10) Describe the issue and action that should be addressed: Dean Smith contacted the Department regarding a provision of 2017 Wisconsin Senate Bill 453 (Act 113): Subject: <u>AMC regulation-Customary and Reasonable Fee Survey</u> Issue to Address: <u>Address establishment of “Customary and Reasonable Fee” Provision of 2017 Senate Bill 453</u> to establish what a Customary and reasonable fee is so appraisal management companies can meet their presumption of compliance.			
11) Authorization			
Signature of person making this request		Date	
Supervisor (if required)		Date	
Bureau Director signature (indicates approval to add post agenda deadline item to agenda)		Date	

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

1) Name and Title of Person Submitting the Request: Dale Kleven Administrative Rules Coordinator		2) Date When Request Submitted: 2/7/18 <small>Items will be considered late if submitted after 12:00 p.m. on the deadline date: ▪ 8 business days before the meeting</small>	
3) Name of Board, Committee, Council, Sections: Real Estate Appraisers Board			
4) Meeting Date: 2/13/17	5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	6) How should the item be titled on the agenda page? Legislation and Rule Matters – Discussion and Consideration 1. Position Statements of the Real Estate Appraisers Board 2. Update on Pending Legislation and Pending and Possible Rulemaking Projects	
7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both		8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes (Fill out Board Appearance Request) <input checked="" type="checkbox"/> No	9) Name of Case Advisor(s), if required:
10) Describe the issue and action that should be addressed:			
11) Authorization			
Signature of person making this request <i>Dale Kleven</i>		Date <i>February 7, 2018</i>	
Supervisor (if required) <i>Erin E Karow</i>		Date <i>2/7/2018</i>	
Executive Director signature (indicates approval to add post agenda deadline item to agenda) <i>[Signature]</i>		Date <i>2/7/2018</i>	
Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, Provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.			



STATE OF WISCONSIN

Department of Safety and Professional Services
1400 E Washington Ave.
Madison WI 53703

Mail to:
PO Box 8935
Madison WI 53708-8935

Email: dsps@wisconsin.gov
Web: <http://dsps.wi.gov>
Phone: 608-266-2112

Governor Scott Walker Secretary Dave Ross

Positions Statements Related to Real Estate Appraisers Issued by the Real Estate Appraisers Board

WI REAL ESTATE APPRAISER BOARD RECOMMENDATIONS FOR THE STUDENT APPRAISER APPLICANT

What to look for and expect from a supervisor as you obtain the experience required for licensure. The supervisor should:

1. Have sufficient knowledge and experience to provide your training. A mentor should be a professional Licensed or Certified Appraiser, in good standing, with several years experience appraising a variety of property types in the state in which you are obtaining your license.
2. Provide "hands on" training in the field for as long as it takes for you to become competent. This training may take months or years; at minimum your supervisor should accompany you on inspections of a variety of property types. Your training should take place in one or two counties or within a fifty mile radius of the supervisor's office.
3. Go with you to inspect a variety of property types, conditions, complexity, and value ranges. The supervisor should show you how to accurately measure a structure, correctly determine square footage, help you identify architectural styles and features; familiarize you with different types of construction, materials and quality differences.
4. Provide instruction in how to properly research, analyze and accurately report your findings. Your supervisor should explain how to describe the neighborhood, how to locate and research various public record sources, how to consult flood plain maps, find tax/assessment data, how to review and analyze historical data, how to confirm zoning and explain the affects zoning has on highest and best use, and how to draw a sketch.
5. Teach you how develop the Cost Approach. Your supervisor should provide training in how determine and support land value, understand and apply physical, functional and external obsolescence, read a cost manual, and estimate effective age.
6. Provide basic instruction in how to develop the Income Approach. Your supervisor can provide more in-depth training in where to obtain rental data, alternate data sources available, income and expenses, how to develop a GRM (gross rent multiplier), and how to estimate rents.
7. Explain the process of selecting appropriate comparable properties in the development of the Sales Comparison Approach. Your supervisor should explain the importance of understanding the market area, of selecting appropriate elements of comparison, how and where to make searches, and how to verify the sales data.

8. Show you how comparable sale adjustments are derived from the market and how this process is ongoing, how to determine which adjustments are applicable, how to support your adjustments, and how to apply those adjustments in your report.
9. Help you to analyze and reconcile the data collected. Provide instruction in how to appropriately consider all the information gathered including prior listings, current competitive listings, and offers to purchase to determine a value opinion.
10. Provide guidance as you write a clear, understandable scope of work which describes the steps you have taken to collect, verify, analyze and report your value conclusions in a manner that is in compliance with USPAP. Remind you to proof read your report for errors, typos, and misstatements.
11. Understand that he or she takes full responsibility for the report by signing and certifying that the report is in compliance with Uniform Standards of Professional Appraisal Practice (USPAP).
12. Understand that any significant assistance supplied by you, the appraiser applicant, must be disclosed in the appraisal report to be in compliance with USPAP and that disclosure will be required to document your experience for licensure. Reports submitted to the DRL by the applicant must be true, accurate signed copies with nothing altered, blacked out or omitted.
13. Understand that the report must, per USPAP, disclose the intended use, intended user, scope of work, and the reporting option. Also, understand, explain and comply with the USPAP record keeping requirements which provide for your access to and retrieval of reports completed while in training.

These are currently board recommendations only. Another resource to consider for training is the Student Appraiser Guide, which can be found at The Appraisal Foundation website: www.appraisalfoundation.org. Links to some organizations which may offer education, continuing education, specialized training and/or assistance to the appraisal applicant include:

The American Society of Appraisers: www.appraisers.org

The Appraisal Institute: www.appraisalinstitute.org

The Wisconsin Realtors Association: www.wra.org