
JULY AUGUST 2021 NEWSLETTER

PRESIDENT'S MESSAGE



Summer is in full-swing and as California begins its great reopening, I hope you find some time to relax with friends and family who you have not seen in awhile. The San Diego Chapter Board continues to monitor the situation and current restrictions. Unfortunately, the in-person education venues we have used in the past are still unavailable to us or are not cost-effective at this point, due to current restrictions. Therefore, we will continue to offer virtual education in the short-term. Provided below are some upcoming educational offerings and links to register.

Upcoming Education

- Complex Litigation Appraisal Case Studies - June 30, 2021 (virtually) [Register Here](#)
- National USPAP 7-Hour Update - July 13, 2021 (virtually) [Register Here](#)
- Business Practices and Ethics - July 15, 2021 (virtually) [Register Here](#)

On a positive note, I would like to congratulate Kimberly Brinker and Justin Weeks for their efforts in achieving the prestigious MAI designation, and to John Pino for his efforts in achieving the prestigious AI-GRS designation. Nice work Kimberly, Justin, and John! We look forward to recognizing all designation recipients in-person at the 2021 Holiday party. Stay tuned.

Also, I would like to welcome three new "Candidates for Designation" Zac Blechman, Amy Edwards., and Percy Tillman. Sean Stinchfield, MAI is the Candidate Guidance Chair; please feel free to reach out and let us know if there is anything we can do to help you along your designation journey.

Thank you and enjoy your summer!

Mark J. Hendrickson, MAI, AI-GRS
2021 Chapter President

REPORT FROM REGIONAL MEETING

Our second quarter Region Meeting, held virtually on April 20th, was chaired by Trevor Hubbard MAI, SRA, AI-GRS, our Region VII Chair. The underlying theme of the meeting was bias and how to avoid it.

President Elect, Pledger M. (Jody) Bishop, III, MAI, SRA, AI-GRS, spoke briefly about the passing of J. Scott Robinson MAI, SRA, AI-GRS, AI-RRS, MRICS. He noted that the AI Lifetime Achievement Award has been renamed to the J. Scott Robinson Lifetime Achievement Award. Jody then gave an overview of the state of the Appraisal Institute, discussing AI's Diversity, Equity and Inclusion efforts, education offerings, recent actions by AI Board of Directors and the financial status of AI. For an overview of those, along with membership statistics, please see the following link to his PowerPoint presentation: [AI](#)

[Overview](#)

Paula Konikoff, JD, MAI, AI-GRS, our Region Vice Chair, reported on the recent 45 day Notice of Proposed Amendments to Appraisal Institute Regulation Nos. 1-3 and the Code of Professional Ethics and the Explanatory Comments to the Code of Professional Ethics, Exposure Draft of Proposed Guide Note: Personal Characteristics and Valuation Practice, and Exposure Draft of Proposed Policy on Appraisal Discrimination and Bias. These changes address the proposed amendments to Appraisal Institute Regulation Nos. 1-3 concerning the College Degree Requirement and the Code of Professional Ethics and Explanatory Comments to the Code of Professional Ethics concerning a proposed new Ethical Rule and a definition of the term "personal characteristic". See [45 Day Notice](#)

Region VII Chair, Trevor Hubbard MAI, SRA, AI-GRS, gave a brief overview of the current financials. Overall, without travel expenses being paid out for the region due to the pandemic, our financials look good! Once the country opens up and travel picks up, we will begin to see travel expenses in the Region.

Government Relations Chair Charles Baker, SRA, AI-RRS, gave an overview of recent Federal and State regulatory meetings discussing valuation bias and continuing education requirements to avoid it.

The meeting was adjourned after a quick discussion of upcoming events, both nationally and regionally. Our next virtual Regional Meeting will be held August 8, 2021.

Respectfully submitted,
Colleen E. Matthies, MAI

OUR NEWEST DESIGNATED MEMBERS!

In May, Chapter member Justin Weeks was awarded the MAI designation.

In June, Chapter members Kimberly A. Brinker was awarded the MAI designation, and John Pino was awarded the AI-GRS designation.

Congratulations, Justin, Kimberly, and John on your achievement!

LEADERSHIP RESOURCE REGISTRY

If you are interested in serving the organization at the national level in 2022, please complete the Leadership Resource Registry no later than 5:00 pm CT, August 2, 2021. To be considered for national committees, panels, the Appraisal Institute Insurance Trust, or the Appraisal Institute Education & Relief Foundation, if eligible, you must express your interests within the Registry. To access the Registry, logon to the AI website and click [the link](#).

Even if you submitted your interests last year in the Registry and there are no changes to your preferences, you will need to log back into the Registry.

We thank you in advance for indicating your preferences in the Registry. We look forward to a strong response, which will help broaden the base of participation in the organization and serve as a source of new ideas and growth.

If you have questions or need assistance completing the Registry, contact Rachael Georges at rgeorges@appraisalinstitute.org.

COMPLEX LITIGATION APPRAISAL CASE STUDIES

Date: Wednesday, June 30, 2021

Time: Check in 8:00 am / Seminar 8:30 am to 4:30 pm

Location: It's Virtual; participate from where it is most convenient

Based on the Appraisal Institute textbook Applications in Litigation Valuation: A Pragmatist's Guide, this seminar discusses in detail three of the book's case studies that provide an overview of litigation strategies for appraisers who are new to litigation work, as well as a reinforcement of litigation skills for more experienced appraisers. Case study topics include title issues, continuing nuisance, and condemnation.

NOTE. Applications in Litigation Valuation: A Pragmatist's Guide is required for this seminar. If you do not have the textbook, please order in the [Online Store](#).

Registrants will connect using ZOOM interactive technology. For the full ZOOM experience, registrants will need a computer, Internet access, webcam, and a microphone. You do not need a paid account from ZOOM to participate.

INSTRUCTOR: Stephen D. Roach, MAI, SRA, AI-GRS

EDUCATION CREDIT: This seminar is approved for 35 points of Appraisal Institute education credit, and for 7 hours of BREA continuing education credit (Approval No. 18CP754601302). Please note that not all states have approved virtual education; therefore, registrants must check their individual states for approval before registering for the program.

SEMINAR FEE: Appraisal Institute Professionals \$209 / All Others \$229

[Register Now](#)

NATIONAL USPAP 7-HOUR UPDATE

Date: Tuesday, July 13, 2021

Time: Check in 8:00 am / Class 8:30 am to 4:30 pm

Location: It's Virtual; participate from where it is most convenient

This 7-hour update course, copyrighted by The Appraisal Foundation, focuses on recent changes to USPAP requirements for ethical behavior and competent performance by appraisers. The course, which clarifies several commonly misunderstood aspects of USPAP, will aid participants in all areas of appraisal practice seeking updated competency in USPAP, including those subject to state licensing or certification and continuing education requirements imposed by professional organizations, client groups, or employers.

COURSE PRICE DOES NOT INCLUDE A COPY OF THE 2020-2021 USPAP DOCUMENT, WHICH IS REQUIRED FOR COURSE CREDIT. Attendees must bring their own copy of the 2020-2021 USPAP document to class, which can be purchased from The Appraisal Foundation at [2020-2021 USPAP](#).

Registrants will connect using ZOOM interactive technology. For the full ZOOM experience, registrants will need a computer, Internet access, webcam, and a microphone. You do not need a paid account from ZOOM to participate.

INSTRUCTOR: Robert L. Moorman, MAI, SRA, AI-GRS

EDUCATION CREDIT: This course is approved for 35 points of Appraisal Institute education credit, and for 7 hours of BREA continuing education credit (BRE A Approval No. 19CP754601397). This course is also approved in most other states for basic and/or continuing education credit. For more information about approval in other states, see [State Approvals](#). Please note that not all states have approved virtual education; therefore, registrants must check their individual states for approval before registering for the program.

COURSE FEE (on or before July 2, 2021): Appraisal Institute Professionals \$189 / All Others \$219
Course fees will increase \$20 on July 3, 2021.

[Register Now](#)

BUSINESS PRACTICES AND ETHICS

Date: Thursday, July 15, 2021

Time: Check in 8:30 am / Class 9:00 am to 4:00 pm

Location: It's Virtual; participate from where it is most convenient

Business Practices and Ethics is an important course that provides information about standards and ethics requirements for valuers in general and, more specifically, for valuers who belong to the Appraisal Institute. Through discussion questions and examples, the class compares behavior and actions that illustrate violations of the Code of Professional Ethics, and participants learn how referrals can be made. Participants are also introduced to the Appraisal Institute Guide Notes to the Standards of Professional Practice and use these Guide Notes to resolve everyday appraisal practice problems. At the end of the course, they learn about common errors in appraisal reports and review reports, and they respond to questions about challenges that arise in appraisal practice such as requests for updates and requests to change or add intended users. These are common business practice issues that appraisers encounter in various assignments, including mortgage lending, litigation, and property tax appeal.

Registrants will connect using ZOOM interactive technology. For the full ZOOM experience, registrants will need a computer, Internet access, webcam, and a microphone. You do not need a paid account from

ZOOM to participate.

INSTRUCTOR: Kenneth G. Foltz, MAI, SRA

EDUCATION CREDIT: This course is approved for 30 points of Appraisal Institute education credit, and for 6 hours of BREA continuing education credit (Approval No. 19CP754601363). This course is also approved in most other states for basic and/or continuing education credit. For more information about approval in other states, see [State Approvals](#). Please note that not all states have approved virtual education; therefore, registrants must check their individual states for approval before registering for the program.

COURSE FEE (on or before July 4, 2021): Appraisal Institute Professionals \$179 / All Others \$209
Course fees will increase \$20 on July 4, 2021.

[Register Now](#)

INCONSISTENCY: IT'S HIDING IN PLAIN SIGHT IN YOUR APPRAISAL

Date: Wednesday, August 18, 2021

Time: Check in 8:00 am / Class 8:30 am to 4:30 pm

Location: It's Virtual; participate from where it is most convenient

Appraisals or reviews of the most experienced appraisers can have inconsistencies in data, analysis, and reporting. This fast-paced and thought-provoking seminar focuses on significant inconsistencies that can have a major impact on the credibility of the appraiser as well as the value opinion. It will bring to light inconsistencies that can affect any part of the appraisal process including the definition of market value, highest and best use, the three approaches, functional and external obsolescence, and reconciliation. Eye-opening discussions and practical problems (including agricultural problems) will keep participants interested and engaged throughout the day.

Registrants will connect using ZOOM interactive technology. For the full ZOOM experience, registrants will need a computer, Internet access, webcam, and a microphone. You do not need a paid account from ZOOM to participate.

INSTRUCTOR: Stephen D. Roach, MAI, SRA, AI-GRS

EDUCATION CREDIT: This seminar is approved for 35 points of Appraisal Institute education credit, and for 7 hours of BREA continuing education credit (Approval No. 21CP754601469). Please note that not all states have approved virtual education; therefore, registrants must check their individual states for approval before registering for the program.

SEMINAR FEE (on or before July 6, 2021): Appraisal Institute Professionals \$169 / All Others \$189
Seminar fees will increase \$10 on July 7, 2021, and an additional \$10 on August 8, 2021.

[Register Now](#)

CHAPTER LEADERSHIP

President: Mark Hendrickson, MAI, AI-GRS; mark@hendricksonappraisal.com

Vice President: Colleen Matthies, MAI; tcmatthies@cox.net

Treasurer: Lee Stephens, SRA; leensharon@cox.net

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Immediate Past President: Jeremy Darner, MAI, SRA, AI-GRS; jeremy@peoplescompany.com

Patti Kreutzer, Executive Director