

The Approach



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1st Quarter Chapter Meeting & CE & 2019 VALUEvent Four Points Sheraton, Tallahassee

When: March 25–26, 2019

Where: Four Points Sheraton Downtown
316 W. Tennessee Street, Tallahassee
www.fourpointstallahasseedowntown.com



Florida State Capital

Fees:

- ***Package Price (All Events):** \$29 M | \$49 NM
- **Craft Brewery Seminar Only:** \$65.00 M | \$80.00 NM (Early registration until 3-15-19)
- **Chapter Meeting and Residential/Commercial Round Tables:** FREE
- **VALUEvent Legislative Lobby Day at the Capital:** FREE

* **VALUEvent Package Price** — \$29 includes seminar and lobby day. *VALUEvent is free to attend; however, participation in lobbying is required to receive the discounted package price for the Craft Brewery CE seminar.*

Schedule of Events

Monday, March 25:

- 1 PM—1:15 PM: Chapter Business Meeting
- 1:15 PM—3:30 PM: Residential and Commercial Round Tables
- 4:00 PM—6:30 PM: Craft Brewery Real Estate Valuation (2 Hr FL CE) & tour of the brewery

Tuesday, March 26:

- 8 AM—9:15 AM: VALUEvent Breakfast Meeting and speaker
- 9:30 AM: [Region X 2019 VALUEvent](#) Legislative Day (more details in newsletter)

Meeting Program: The 1st Q chapter membership meeting in Tallahassee will be a very brief business meeting followed by the residential roundtables at the Four Points hotel. The next event will be a 2-hour educational CE offerings which will be held off-site at Proof Brewing Company. This seminar will be moderated by Wes Sanders, MAI with other speakers in the craft beer industry. It should all be very informative—**register today!**

Note—Due to the legislative session, there are limited [sleeping rooms](#) available at the Sheraton. We have a block of rooms available until [March 4, 2019](#) for a reduced rate of \$209/night. [Make your hotel reservation today.](#)

We hope to see you at the 1st Quarter chapter meeting and all other events being held in Tallahassee! Stay informed about all the issues of importance to us, locally, state-wide and nationally. Take advantage of the discount price and attend all events.

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Finance: Brian Zamorski, MAI
Guidance: Jennifer Marshall, SRA
Education: Julie Battaglia, MAI
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Newsletter: P. Staebler/ Nancy Bacher
Public Relations: Brian Zamorski

Chapter Executive Director

Nancy Bacher
(813) 962-4003
info@gulfcoastai.org

Region X Officers

Nick Pilz, MAI, SRA, Chair
Elaine Liz-Ramirez, Vice Chair
Lauren Dowling, Region ED

REGISTER HERE

Florida Gulf Coast Chapter, Appraisal Institute

P. O. Box 273994, Tampa, FL 33688 T: 813-962-4003 Website: www.gulfcoastai.org



President's Message, Julie Battaglia, MAI, AI-GRS



I hope everyone is back into the swing of things and had a good start to the New Year! I am honored to be the President of the Florida Gulf Coast Chapter of the Appraisal Institute for 2019. With well over 400 members, we are the largest Chapter in Region X. I am confident this year will be a busy one with all of the events, meetings, and educational offerings that are underway for our Chapter members and leadership this year. The 2019 Officers, Board of Directors, Region Representatives, and Committee Chairs / Members are continuing to work very hard for our Chapter, and I want to say thank you to each and every one of them for their steadfast volunteer efforts. I also want to thank Nancy Bachor, our forever diligent Chapter Executive Director, as she keeps everything on track each year. I would also like to send my gratitude to all of the volunteers from 2018.

My request to the membership this year is to consider joining a committee or volunteering in some way to become more involved with the Chapter, especially if you've never volunteered in the past. We need to maintain a strong group of volunteers to move through the positions in our Chapter, so please reach out to Nancy or myself if you are interested in volunteering at any time!

One of my goals this year is to make sure the Chapter Members are receiving the **educational offerings** they need around our footprint. I am also the current Chapter Education Chair, so this is a multifaceted goal. It may be obvious, but for those of you that don't know, our educational offerings are one of the main revenue sources funding our Chapter each year. Our 2019 Education calendar has a solid offering of courses and seminars this year for those of you that want to get a leg-up on the 2019-2020 renewal cycle. Please remember to visit our Chapter website often to see the most current list of educational offerings available. We may add a course or two throughout the year. Please let Nancy or myself know if you have any specific requests. We want to make sure we're offering what the Chapter members need!

Our Chapter Meetings also always incorporate an educational offering, and we will be holding four Chapter Meetings throughout the chapter footprint this year. The **1st Quarter Chapter Meeting** will be held in Tallahassee on Monday, March 25th (2 hour course). The **2nd Quarter Chapter Meeting** will be held at The Marina at Edison Ford in Ft. Myers on May 16th (3 hour course). The 3rd and 4th Quarter meetings are still in the planning stages but will be held in Tampa on August 22nd with a 7 hour Ted Whitmer class) and Sarasota (Installation Dinner meeting) on November 8th with a 3 hour course, respectively. We hope to see you there!

I also wanted to make sure the Chapter is aware of the Region X functions occurring this year as we have three in-person events this year rather than just two. The first event took place in Orlando on February 8th and 9th. The next event, and the most important regarding Chapter membership participation, takes place in conjunction with the 1st Quarter Chapter Meeting in Tallahassee. We will have a condensed afternoon Chapter meeting, two Round Table events, and an evening 2 Hour Craft Brewery CE offering on Monday, March 25th. We will then host a breakfast and lobbying event on Tuesday, March 26th, which is our 3rd Annual VALUEvent. We are offering a heavily discounted price for those members that attend both days. **Please see Region X 2019 Meetings and Events section for more information, and to sign up through the Chapter website's course registration page!**

Another initiative we began implementing at the end of 2018 was to plan and incorporate additional joint events with other real estate related professional organizations. This is beginning to take shape in 2019. (Credit for this initiative goes to Immediate Past President, Wes Sanders, MAI, AI-GRS.) As you may recall, the first event was held on January 30th. This was a happy hour networking event at Mitchell's Fish Market in Tampa between the Florida Gulf Coast Chapter of the Appraisal Institute and the Florida Gulf Coast Commercial Association of Realtors (FGCAR). There were plenty of brokers and appraisers in attendance, and Mitchell's had a nice spread of food and drinks. We had a nice turnout, and both groups considered the event a success. Another opportunity being considered is a large joint event between several different real estate professional organizations that is targeted for 4th Quarter 2019. We are looking for other opportunities for joint events as well, so please let us know if you have any suggestions!

(Continued next page)

President Message, *cont'd.*

Further, we are always looking for sponsors to help us with Chapter meetings and events. Please contact Nancy for sponsorship opportunities. This allows our members and vendors to showcase valuable information that can benefit all of us, and it supports higher-quality meetings at lower costs. We are always trying to keep our Chapter dues within reasonable ranges, and we have been able to maintain competitive chapter dues over the years by running a lean budget and making sure we're at least breaking even with our educational offerings.

And please remember, it's important to support the Chapter and each other by attending Chapter meetings and events and by taking Chapter education! As I indicated before, these are the Chapter's revenue sources and help Chapter Leadership keep costs competitive while giving our members better rates for educational offerings and events. Chapter Leadership will always continue to strive to bring value to your Florida Gulf Coast Chapter membership.

Last, but not least, I wanted to recognize John R. Underwood, Jr., MAI, SRA of Lantana, FL (South Florida Chapter) who received the James H. Pritchett Award at the Joint Region Meeting in Orlando this year. This award, established in 2002, recognizes a Designated Member of the Appraisal Institute for outstanding contributions to appraisal education or mentoring in a manner that reflects the character and lifelong commitment of James H. Pritchett, MAI, SRA, whose greatest attributes included his leadership and integrity, often demonstrated by his exceptional work in teaching, writing, mentoring and professional practice in litigation support and eminent domain. Please help me in celebrating our own Region X recipient and one of Florida Gulf Coast Chapter's educational instructors, John R. Underwood, Jr., MAI, SRA! We will see John in Ft. Myers in May for the Trial Components seminar at our 2nd Quarter Meeting this year.

Thanks for taking the time to read through the Newsletter, and I look forward to serving as your Chapter President in 2019!



Message from Chapter Leadership regarding Chapter Financial Management Administration Policy

As many Chapter members have learned, the Appraisal Institute's National Board of Directors voted during their November 2018 meeting to officially implement the Chapter Financial Management Administration Policy (CFMAP), and all chapters that haven't already converted to the new system are now being on-boarded in a rolling fashion throughout 2019 and 2020. As this platform is now mandated, Chapter Leadership was provided a list of dates to begin the process, and we are scheduled for a November 2019 implementation date. During our discussions regarding the implementation process and CFMAP in general, we found out that the Florida Gulf Coast Chapter is the last chapter within Region X to move to the new platform, and Region X itself is up and running on CFMAP as well. Therefore, we have had the ability to discuss the new system with other Chapters in our Region to gain a better understanding of the changes forthcoming. Overall, the consensus of the experience was positive, and it is understood that Region X is expected run smoother with all of the chapters on the same system.

Please know that Chapter Leadership understands there are different opinions throughout membership on the CFMAP. However, we wanted to share that we are confident, after meeting with National Leadership in Chicago and gathering opinions from other chapters already operating on the CFMAP system, that this change will be an improvement to the current operational processes and will assist with efficiencies to support the Chapter.

2019 VALUEvent - Tuesday, March 26, 2019

Appraisal Institute members are invited to attend the 3rd annual, [Valuation-Appraisal - Legislative Update Event \(VALUEvent\)](#) in Tallahassee, FL, hosted by the Appraisal Institute's Region X and the Florida Gulf Coast Chapter.

The Appraisal Institute's **Florida Gulf Coast Chapter** will hold its 1st Quarter chapter meeting on Monday, March 25th at 1 PM at the Four Points Sheraton Downtown followed by Residential and Commercial Roundtables from 1:15 PM—3:30 PM. We encourage members to attend and learn about legislative issues facing the industry, and how we can make the appraisal industry better. We hope you will be there.

On **Tuesday morning, March 26th**, the Appraisal Institute's Florida Region X, is sponsoring the **VALUEvent** continental breakfast from 8:00 -9:15 a.m. at the Four Points Sheraton. Appraisal Institute member in Florida are encouraged to attend this event. Attendance will be limited to the first 40 participants that [RSVP HERE](#) or on the Florida Gulf Coast Chapter's website. There is no cost for Region X (Florida) members to attend the VALUEvent. However, *participation in the legislative day is required if registering for the discounted VALUEvent package. Legislative day no shows agree to pay the full seminar price of \$65.*



2018 VALUEvent

Our guest speaker will be **Florida State Representative Dane Eagle**, who will provide an overview of new legislative items and specifically anything relevant to real estate or real estate appraisal. Representative Eagle is the current Majority Leader and is in the commercial real estate business. We will also hand out talking points on any pending legislation affecting the appraisal industry to leave with the elected officials.

After our lobbying efforts, we will have an informal lunch for those that would like to meet and de-brief any feedback received at 12:30 p.m. near the Capital. Note: Once registered for VALUEvent package, No Shows to the lobbying will be billed an additional \$36.

Be on the lookout for **VALUEvent** update emails over the next few weeks with a **Call to Action** to help contact your elected official and set a meeting in Tallahassee. We hope to see many of you there to participate in this very important event.

Four Points Sheraton Reservations: There is a sleeping room block available to Appraisal Institute members until March 4th. Go to: <https://www.marriott.com/event-reservations/reservation-link.mi?id=1547241721228&key=GRP&app=resvlink>.

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Region X 2019—Meetings and Events Update

1st Region Meeting – Joint Region Meeting (Regions II, V, VI, IX, X)

The first Region X event took place on February 8th and 9th. Region X hosted and participated in a Joint Region Meeting that was held at the B Resort in Orlando. The Friday agenda included an excellent inspirational opening speaker and five mini-LDAC sessions. There were 109 attendees on Friday, and the mini LDAC sessions included topics such as Rolling Out the Welcome Mat to new members, The Best Way to deliver education, How Should We Lead in the industry, how to Focus on Client Needs, and Do We Really Police our members to maintain a higher standard. The Saturday agenda included a morning of National AI updates, and the individual Region Meeting sessions were then held over lunch and into the afternoon.



Joint Regional Meeting, Orlando

National AI Update

I wanted to share with you a few of the updates from the information presented.

- ♦ First, the Appraisal Institute will be replacing its Association Management System with a new system, which is expected to begin implementation towards the end of this year. The new system will bring dynamic changes to operations allowing for better performance metrics and an improved member experience. This is the first step towards a new and improved **Appraisal Institute website**, which will start with updates to the user experience post-login for members. It is understood that implementation will be challenging, but the long-term benefit will be worth the transition. There will be more to come on this item later this year.
- ♦ Second, the National Board of Directors voted at the end of 2018 to fully implement the **Chapter Financial Management Administrative Policy** throughout all Chapters during calendar years 2019 and 2020. The on-boarding process for all Chapters is expected to be complete by year end 2020. It was reported that 70% of Chapters are either already using CFMAP or are scheduled for implementation.
- ♦ Third, there was a presentation on **AI benefits**. This was a good reminder for all members to visit AI's website periodically to take advantage of all the member discounts and other benefits that are available.
- ♦ Fourth, the AI course **Business Practices and Ethics** has been recently revised. This is something to watch for as we were told the course went through heavy revisions. We suspect it's a good time to take BP&E to learn about the changes.
- ♦ Lastly, per the most recent National Board of Directors Meeting held on February 21-22, 2019, it was decided that the **2020 Appraisal Institute National Conference** will be held in Orlando! We will provide updates as more information becomes available.

The **Government Relations update** included several items as well, and I have presented two that I found rather important.

- ♦ First, the **"President Signs Legislation Increasing Commercial Appraisal Threshold"**. The SBA commercial real estate minimum loan threshold that required an appraisal had previously been \$250,000, and the threshold has now officially increased to \$500,000. Additionally, the National Credit Union Administration is considering a proposal to raise their commercial real estate loan threshold to \$1 million. If the federal bank regulatory agencies follow suit, which is possible considering the competition in the market, there could be a much larger impact to appraisal requirements for those lenders that only order appraisals for the required threshold levels. It is noted that lenders may still choose to order an appraisal below the minimum thresholds as well for sound business practices. However, if there is ultimately an increase to the threshold for credit unions, and it's possible the other federal bank regulatory agencies follow suit, then appraisal requests are still likely to decrease.
- ♦ Second, the **"AI Opposes Residential Appraisal Threshold Increase, Asks Appraisers to Comment"**. The Appraisal Institute participated with representatives from the American Society of Appraisers, American Society of Farm Managers and Rural Appraisers, and Massachusetts Board of Real Estate Appraisers in meetings with members of Congress. The AI and the other groups asked the members of Congress to review the proposed increase to the residential appraisal threshold. The Federal Reserve, the Federal Deposit Insurance Corporation, and the Office of the Comptroller of the Currency (the "Agencies") proposed raising the residential appraisal threshold from \$250,000 to \$400,000. The appraisal organizations had previously requested the Agencies hold a public hearing on the proposal following an exhaustive review of comments that showed opposition to the proposed residential appraisal threshold increase outweighed other comments five to one; however, the Agencies denied the request for a public hearing. The Agencies indicated they would carefully consider any written comments. The appraisal organizations are preparing a formal written comment for the record. It is noted that the AI Government and External Relations staff members are on top of these concerns and advocating on AI members' behalf on a daily basis.

Region X Meeting Update

During the Region X Meeting, all Florida Chapters and the Puerto Rico Chapter were represented. Our Region Chair, Nicholas D. Pilz, MAI, SRA, AI-RRS, and Vice Chair, Elaine Liz-Ramirez, MAI, led the discussion. One item of importance was the **Region Structure**, and during that discussion it was indicated that the National Board of Directors has received ample feedback regarding maintaining the Regions. This was an indicator that the Regions will likely remain in place, and membership may actually begin to see more Joint Region Meetings taking place, similar to this one held in Orlando.

We also discussed **member services**, how to keep costs lower for our members, and ideas on providing better services to our members overall.

Finally, we held a rather detailed discussion regarding **AI online education** available in Florida and why the options seem fairly limited in Florida. We also noted a concern regarding online approvals for QE vs CE credit in Florida. These same online education issues were duly noted by National Leadership as they were involved in a good portion of the discussion of these topics as well. There will be updates provided on this topic as they become available.

2nd Chapter/Region Event – VALUEvent in Tallahassee

The second event of the year, will include both our 1st Quarter Chapter Meeting and the 3rd Annual **VALUEvent** to be held in Tallahassee on March 25th and 26th. Please consider joining us for these important events!

The Day 1 agenda has changed this year to include a condensed **Chapter Meeting** starting at 1:00pm, which will lead right into two **FREE Round Table events** for the Residential Appraiser and the Commercial Appraiser. All AI members and non-AI members are welcome and all are important participants to make this event a success! The Round Table events are a chance for all appraisers to discuss specific residential and commercial hot topics, allow participants to ask questions about industry concerns, and to discuss what AI is doing to help the residential appraiser and the commercial appraiser. We really would love your attendance and ideas here!

We will then move over to **Proof Brewing Company** for a **2 hour CE** offering with a brewery tour to end the evening.

The Day 2 agenda is dedicated to the **VALUEvent**, which is also FREE, so please mark your calendars and attend! This event includes a breakfast with State House Majority Leader Dane Eagle attending as our guest speaker. He will give us a legislative update, guidance for our lobbying efforts, and discuss applicable real estate related agenda items. The rest of the morning will be spent with chapter members from all over our Region X footprint assisting one another with lobbying our State congressmen/women in Tallahassee. We will have Scott DiBiasio (Appraisal Institute's Washington D.C. office – Government and External Relations, State and Industry Affairs) in town that day as well for support. Scott typically joins us for appointments or meetings set up with key decision-makers for our agenda items and has been instrumental in assisting us with lobbying efforts regarding important issues affecting our profession in Florida. Overall, the VALUEvent has directly contributed to the successful passage of beneficial legislation for appraisers in recent years, and we will continue fighting to keep our voices heard. Please come join us and learn about the issues on the table! **Be on the lookout for the VALUEvent flyer being sent out by the Chapter!** We will be at the Four Points Sheraton for VALUEvent. The AI hotel room block is open and available until March 4th. Book your room today! Please sign up for the events through the Chapter website course registration page!

3rd Region Meeting – Denver – right before AI National Conference

The third in-person **Region X meeting** will be held on July 21st in Denver. This Region Meeting is the main annual meeting with travel outside the State of Florida and is held the Sunday before the AI National Conference begins. More details on this meeting will be made available closer to the 3rd Quarter.

Ultimately, we have a pretty active Region Meeting schedule this year, and we would love to see as many members as possible for the VALUEvent in Tallahassee coming up soon! Please feel free to contact Nancy with any questions.

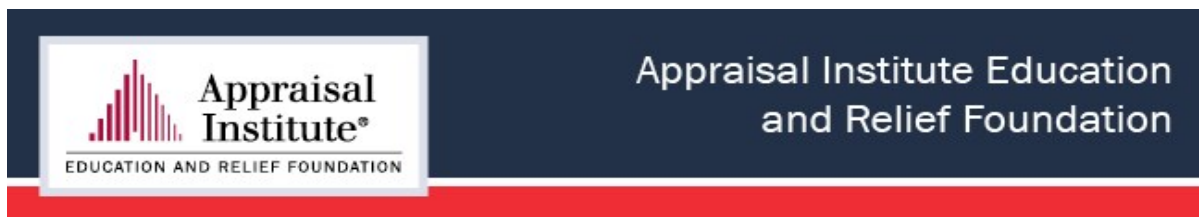


Pritchett Award Recipient

Congratulations to **John R. Underwood, Jr., MAI, SRA**, of Lantana, Florida, who was selected as this year's recipient of the James H. Pritchett Award from the Appraisal Institute Education and Relief Foundation Feb. 9 at the joint region meeting in Orlando.

The Pritchett Award was created in 2002 in memory of the late James Pritchett, and recognizes a Designated Member of the Appraisal Institute for outstanding contributions to appraisal education or mentoring with a focus on litigation and condemnation.

John was a very deserving recipient of this award and the Florida Gulf Coast Chapter congratulates him on this award.



AIERF Accepting Award Nominations, Offering Scholarships

Would you like to help recognize your fellow valuation professionals, or are you potentially deserving of a scholarship?

The Appraisal Institute Education and Relief Foundation is accepting nominations until March 29 for the Y.T. and Louise Lee Lum Award, which recognizes individuals who have made distinguished contributions to the valuation profession during the immediate preceding year. [Learn more.](#)

AIERF also offers several scholarships throughout the year, including two with an April 15 application deadline: AIERF Graduate Scholarship; and AIERF Minorities and Women Education Scholarship. [Learn more.](#)



<https://www.appraisalinstitute.org/reviewer/>

Jobs Board

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Experienced MAI Commercial Appraiser. National Appraisal Group is looking for an experienced commercial appraiser with an MAI designation in the Tampa Bay area. We are seeking a new Team Member to serve as Managing Director. Use your skills to become a *Commercial Real Estate Expert*, not just an appraiser. For more information, please see <http://nationalapg.com/join-us/>.

SENIOR APPRAISER

The Property Tax Oversight Program for the State of Florida Department of Revenue has immediate position available for a Senior Appraiser, based in the Orlando area. The ideal candidate would have at least 4 years of commercial appraisal experience, and be an active Florida State Certified General Appraiser. In lieu of a senior-level real estate appraisal designation or State Certified General Appraisal license, the applicant may have completed 300 hours of Florida pre-licensing training and 3000 hours of USPAP compliant commercial appraisal experience and be a Registered Trainee. Candidates must be detail oriented, have excellent communication skills, a strong writing ability, time management skills and problem solving skills; must be computer proficient in Microsoft Office Suite. The State of Florida offers a competitive compensation package, health benefits, company resources, flexible/telework opportunity and a retirement plan. Those interested in this position may follow the link noted below to submit an on-line application using the State's People First system:

<https://jobs.myflorida.com/job/ORLANDO-SENIOR-APPRAISER-73000577-FL-32801/529912500/>

Resumes received outside of the State Hiring portal will not be considered.

2019 Committee Chairs

Candidate Guidance:	Jennifer Marshall, SRA, AI-RRS	Nominating:	Wesley Sanders, MAI, AI-GRS
Bylaws:	Patricia Staebler, SRA	Programs:	Rachel Zucchi, MAI
Education:	Julie Battaglia, MAI, AI-GRS	Public Relations:	Brian Zamorski, MAI
Finance:	Brian Zamorski, MAI	University Relations:	Bruce Cumming
Government Relations:	Devon Carter, MAI	Newsletter:	Patricia Staebler Nancy Bachor

2019 Florida Gulf Coast Chapter Meetings

Save the dates!!



1st Quarter Meeting - March 25 - Tallahassee
 2nd Quarter Meeting & Elections - May 16 - Ft. Myers
 3rd Quarter Meeting - August 22 - Tampa
 4th Quarter Meeting & Installation - November 8 - Sarasota

Education, Julie Battaglia, MAI, AI-GRS, Committee Chair

First of all, we would like to thank everyone who attended **Florida Gulf Coast Chapter** education in 2018 and supported the chapter programs. We provide top-notch instructors and our chapter is one of the best in the country. 2019 will not be a state recertification deadline year, so we have less offerings planned. Classes will, however, be added if any timely topics arise. Remember that it is never too early to begin accumulating your CE hours for the next renewal deadline, which will be November 30, 2020. Don't let it sneak up on you.



Julie Battaglia, MAI, AI-GRS

We are excited to get the year going with an interesting 2-hour seminar **Craft Brewery Real Estate Valuation** in conjunction with the 1st Quarter Meeting and the 2019 VALUEvent in Tallahassee on Monday, March 25 and Tuesday, 26th. This seminar is approved for 2 hours of Florida CE credit and pending FREC credit hours. Seminar panel of speakers from the industry will include a Brewery Owner, Brewery Industry Attorney, and an Appraiser experienced in Brewery Valuation. Topics will include brewery industry basics, regulations, brewery real estate trends, as well as a tour of the facility, and a product sample. See the article on VALUEvent in the newsletter for the details on all the events.

In February, we offered the new 7-hour class **Evaluating Commercial Leases** with Rick Borges in Sarasota. Next up will be **Practical Applications in Appraising Green Commercial Properties** on March 14—15th in Tampa. Our instructor will be Tim Runde, MAI. The newly revised **Business Practice & Ethics** class will be held in both Tallahassee and Tampa this year, so sign up early. This class is always well attended.

We have several very interesting chapter-developed seminars on the schedule, including **The Cost Approach: Unnecessary or Vital to a Growing Practice?**, a 7-hour class developed and Instructed by Craig Steinley, SRA, AI-RRS on April 11th in Tampa. It has been submitted for FREAB CE credit. In May, we will offer the popular John Underwood seminar **Trial Components: Recipe for Success** in Ft. Myers. This will be a panel format with one or two local attorneys from the Ft. Myers area, in addition to Jackson H. Bowman IV, Esq from Tampa. This seminar is pending 3 hours of Florida CE credit. Two other new seminars will be offered in June and July, **Valuation by Comparison: Residential Analysis and Logic** with Sandy Adomatis, SRA and **Appraisal Aerial Inspections Using a Drone** with Lamar Ellis, MAI in Destin, FL. We hope you review our entire 2019 education schedule which is included in this newsletter and plan to attend many of these interesting offerings.

Our chapter education goal is to give you the best instruction, material and topics on a timely basis. Sign up for them as early as possible to ensure the minimum attendance needed and advantage of the early registration discounts. In this time of expanding on-line education, many of you have told us you still desire a classroom setting. Your chapter exists primarily because of classroom education. We receive very minimal funding from National for the on-line programs. Our education program helps keep our chapter dues one of the lowest in the country. You can help keep our chapter financially stable by supporting our programs. Get what you need locally.

Check the website often for any new additions to the education schedule and other chapter news. The Florida Gulf Coast Chapter website can be found at www.gulfcoastai.org.

Questions? Please call the chapter office at (813) 962-4003 or email Nancy at info@gulfcoastai.org or contact education chair Julie Battaglia with any questions or suggestions. **To register for classes:** <http://www.appraisalinstitute.org/education/FloridaGulfCoast.aspx>

Are you interested in developing a 2—3 hour seminar? We are always looking for interesting 2 - 3 hour topics. Please consider developing a continuing education (CE) program that would be beneficial to our appraisers and the industry.

2019 Education Schedule



Date	Class	Instructor
February 21	Evaluating Commercial Leases - Sarasota (7 CE)	Richard Borges, MAI, SRA
March 14–15	Practical Applications In Appraising Green Commercial Properties (7 CE)	Timothy Runde, MAI
March 25–26	1st Quarter Chapter Meeting and VALUEvent —Tallahassee Craft Brewery Real Estate Valuation (2 CE) 2019 VALUEvent	Panel of Speakers
April 11	The Cost Approach: Unnecessary or Vital to a Growing Practice (7 CE Pending) (Tampa)	Craig Steinley, SRA, AI-RRS
May 9	Business Practice & Ethics (4 CE) - Tallahassee	Barry Diskin, Ph.D., MAI
May 16	2nd Quarter Chapter Meeting & Elections - Ft. Myers Trial Components: Recipe for Success (3 CE)	John Underwood, MAI Panel of Attorneys
June 12	Valuation by Comparison: Residential Analysis and Logic (7 CE) - Tampa	Sandra K. Adomatis, SRA
July 25	Appraisal Aerial Inspections Using a Drone (7 CE pending) - Destin	Lamar Ellis, MAI
August 22	3rd Quarter Chapter Meeting - Tampa Raise Your Appraiser IQ (7 CE)	Ted Whitmer, MAI
October 3–4	Appraiser as Expert Witness (15 CE) Tampa	John Underwood, MAI
October 24	Business Practice & Ethics (4 CE) (Sarasota)	Vincent Dowling, MAI
November 8	4th Quarter Chapter Meeting & Installation Seminar TBA (Sarasota)	
TBA	Rural Valuation Basics (Tallahassee)	
TBA	TBA	

To register for any of the above classes, go to:
<http://www.appraisalinstitute.org/education/FloridaGulfCoast.aspx>
 Questions? Call chapter office at (813) 962-4003 or email info@gulfcoastai.org
 Florida Gulf Coast Chapter, P. O. Box 273994, Tampa, FL 33688

Candidate Guidance

Candidates: Your Annual Minimum Progress is shown in the form of a graph on our MY AI ACCOUNT page. The chart is located in the right-hand column, and the display shows how many requirements you must complete (blue bar) and how many requirements you have already completed (gold bar). Check your [Candidate Status Report](#) for a list of remaining designation requirements.

2019 Capstone Program— for the candidates seeking the MAI designation, please note that the General Demonstration Report—Capstone Program—will be offered in just a few locations this year. Offerings are scheduled in Chicago, Nashville and Philadelphia. For more information on the Capstone Program and the other options, there is a new Capstone page online, which makes it easy to see the schedules, registration deadlines, etc. [Click Here](#).

Experience Requirements—The purpose of the Appraisal Institute Experience Requirements is to determine if a Candidate for Designations work meets the requirements specified in applicable AI Regulations, Policies, and Procedures, including Significant Professional Responsibility, Reasonable Relationship of Hours, and the [Appraisal Institute Standards of Professional Appraisal Practice](#) (or other relevant criteria). Candidates should be open to listening to and exchanging information with the Experience Screener. The Experience Requirement and interview is a learning process, whether or not your credit is approved. You likely will come away with new ideas for reporting and possibly a better understanding of theory and techniques.

Reports must be submitted in their entirety, which means that the report is to be submitted just as it was sent to the client. Reports are not to be edited or altered in any way for the experience process. All work for which experience is claimed must have been performed for a business purpose (mock experience and mock review experience is ineligible).

We currently have **38** candidates for designation and **3** members seeking the review designation. We ask that our designated members and candidates encourage any non-designated appraisers to consider getting any AI designation and contact the Candidate Guidance Committee if we can answer any questions they may have and/or explain the many benefits of Appraisal Institute affiliation and designation.

Seven candidates received their designations in 2018. **CONGRATULATIONS** to the following members:

- **Michael Kelly, SRA** • **Jonathan Hurt, MAI** • **J. Bruce Cumming, Jr., MAI** • **Steven Norris, SRA**
- **Roger McDonough, MAI** • **Byron Torres, MAI** • **Caroline C. Sutton, AI-GRS**

Candidates for Designation

CE Requirements

Candidates and Practicing Affiliates must complete 70 hours (350 points) of continuing education for every five-year cycle. Designated members must complete 100 hours (500 points) of CE every 5-year cycle. The points system offers an incentive to individuals who attend advanced education. AI will now reward individuals who take and pass exams. The system's tiered point structure allocates higher point values to courses and seminars defined as advanced education. For more information, visit the AI website.

Generally, 1 hour of CE = 5 points (1% of 500 points) or more. This formula is also used for education taken outside of AI, which members can add on their own by logging onto the website and clicking: Add Credit to My AI CE Log.

USPAP and Business Practice & Ethics are each valued at 35 points.

Government Relations Report, Devon Carter, MAI—Chair

If you haven't had the opportunity to sit in on a FREAB meeting, it is well worth your time. I attended my first at the beginning of February and got to see a few instances of "what not to do" as an appraiser. Plus, as an added benefit, you will receive five hours of CE credit.

The Appraisal Institute has recently co-signed a letter to the FDIC, Office of the Comptroller and the Federal Reserve Board of Governors with 17 other appraisal and real estate-related entities. The letter essentially reiterates the opposition to raising the threshold for residential appraisals from \$250,000 to \$400,000. It has only been two years since the lower threshold was upheld.

As you may have heard, Governor DeSantis has initiated a "Deragathon" that will reduce needless drags on economic growth and impediments to competition. A primary effort that we have been pushing has been clarification of the laws regarding Evaluations. Currently, Federal regulations allow almost anyone to perform an evaluation. However, the legislation we lobbied for, and got passed in 2017, has resulted in FREAB undecided whether or not evaluations can be done in Florida outside USPAP. We have asked the governor to include our efforts in the regulatory relief by clarifying the laws applicable to certified appraisers. At the aforementioned FREAB meeting, Scott Dibiasio, Jennifer Marshall and I each spoke to the board about the evaluation issue and to provide clarification. As per usual, they essentially "kicked the can" down the road.

Looking at education opportunities, Florida is lagging most other states in getting qualifying and continuing education approved. I recall having to get most of my QE out of state due to the lack of classroom opportunities in Florida that were presented on a reasonable schedule. As part of the Deragathon, the Appraisal Institute is also trying to streamline this system, allowing more synchronized and on-demand opportunities. Currently, Florida has more stringent requirements for online education than either AQB or IDECC. The approval process would be more in line with AQB and IDECC requirements to have education approved for CE and QE in Florida rather than specific requirements for Florida.

Our friends at the Realtors Association, are proposing to reduce the number of FREAB board members from nine to seven by eliminating one of the AMC positions and one of the public member positions. The result would bring FREAB back to four Appraisers and three non-appraisers instead of the current situation that has more (5) non-appraiser members than (4) appraiser members. Overall, we are in support of this proposition.

Coming up on March 25-26 is the region's annual ValuEvent in Tallahassee. This is when the state AI Chapters head up to meet with their legislators in an ongoing effort to improve communication between appraisers and lawmakers. Our chapter is leading this effort and our 1st Quarter Chapter Meeting will occur in Tallahassee as well. We are currently working with Scott DiBiasio getting our talking points in order, including the ongoing concerns about evaluations. If you have any particular concerns that you think should be addressed, feel free to let me know.

Along with the legislative efforts, there is a continuing education opportunity on *Craft Brewery Real Estate Valuation*, which will be held at Proof Brewing Company. If you are interested in attending, please see the education section of the AI website.

Florida Real Estate Appraisal Board Meetings

2019 General Meetings

- Monday, April 1, 2019
- Monday, June 3, 2019
- Monday, August 5, 2019
- Monday, October 7, 2019
- Monday, December 9, 2019

The Division of Real Estate is now able to [live stream](#) their meetings. The streaming is not recorded and it has limited space at this time. If you are unable to access the meeting, please try again later as access may become available during the day. If you have connected to the live stream and no longer wish to view the meeting in progress, please be sure to disconnect to allow others to access the live stream. <http://www.myfloridalicense.com/dbpr/re/FREABMeetings.html>.

If you wish to have printed materials to reference during the meeting, please visit the website

www.myfloridalicense.com > *Doing Business with Us* > *Real Estate Division Page* > *Florida Real Estate*

Appraisal Board > *Meetings & Workshops*, and print all publicly available materials as early as 7 days before the date of the meeting. The department endeavors to minimize paper usage in all business practices. If you plan to attend for CE credit, you will need to attend the full day. All FREAB Meetings begin at 8:30 a.m. and are held at the Division of Real Estate Commission Chambers in Orlando unless stated otherwise.

The FREAB invites and encourages all members of the public to provide comment on matters or propositions before the Board or a committee of the Board. The opportunity to provide comment shall be subject to Rule 61J1-7.020, Florida Administrative Code. To submit written notice, send to the attention of *FREAB Public Comments* via email to: realpublicrecords@myfloridalicense.com or fax to 407-317-7245.

Interested in sponsoring a chapter meeting or event? Sponsorship opportunities are available for our chapter meetings. Contact the chapter office for more details! Sponsorships include recognition in email blasts, chapter website, newsletters in addition to recognition at chapter meetings.

Event Sponsorships Available....[Click Here](#) to Become a Meeting Sponsor Today!

Reminder to Chapter Officers, Directors, Committee Members and Region Reps!

Designated members and Practicing Affiliates can log their own Service to the AI. Please remember to log your service through the [AI CE Log](#).



Do you have the
Designated Difference?



Knowledge. Experience. Integrity. The MAI, SRPA, SRA, AI-GRS and AI-RRS designations represent advanced knowledge. They stand for years of proven, real-life real estate valuation experience. Any they always mean a commitment to strict professional ethics and standards.

Florida Gulf Coast Chapter, Appraisal Institute

P. O. Box 273004, Tampa, FL 33688 T: 813-962-4003 Website: www.gulfcoastai.org

2019 Leadership - Florida Gulf Coast Chapter

The following individuals were elected to serve the position of 2019 officers, directors and regional representatives for the **Florida Gulf Coast Chapter** and were installed at the **November 9th** chapter meeting in St. Petersburg. Their term began January 1, 2019. We want to thank them all for volunteering their time to serve the chapter, the region and the Appraisal Institute in these important positions!

Florida Gulf Coast Chapter - 2019 Officers

President: Julie Battaglia, MAI, AI-GRS

Vice President: Rachel Zucchi, MAI

Treasurer: Brian Zamorski, MAI

Secretary: Patricia Staebler, SRA

Directors (2017-2019)

Timothy Sunyog, MAI

Michael Twitty, MAI

Wes Sanders, MAI, Ex-Officio

Directors (2018-2020)

John Fabian, MAI

Brad Saucier, MAI

Directors (2019-2021)

Devon Carter, MAI

Byron Torres, MAI

Michael Cliggitt, MAI

Jennifer Marshall, MAI

Region Representatives (2017-2020)

Ned Palmer, MAI

Andrew Skinner, MAI

Rachel Zucchi, MAI

Region Representatives (2018-2021)

Jennifer Marshall, SRA, AI-RRS

Region Representatives (2019-2022)

Michael Cliggitt, MAI

Michael Jonas, MAI, AI-GRS

James "Matt" Terry, SRA

Patricia Whittington

Alternate Region Reps - 2019

Don Saba, SRA

Michael Twitty, MAI

Brian Zamorski, MAI

Wesley Sanders, MAI

Dan Richardson, MAI

Karen Goforth, MAI

John Fabian, MAI

Patricia Staebler, SRA

Woody Herr, MAI

2019 Comp Exam Dates

Submit your applications for 2019 exams by deadline dates below :

April 1—April 30, 2019: Application Deadline—February 20, 2019

August 1—August 31, 2019: Application Deadline—June 20, 2019

November 1—November 30, 2019: Application Deadline—September 20, 2019

Examinees must take ALL required modules within their chosen 30-day window—transfers and refunds are NOT permitted.

[Click Here for Comp Exam Information](#)

Questions? comp@appraisalinstitute.org
or call (312) 335-4111

New Appraisal Institute Book Addresses Corridor Valuation

"In response to a pressing need among valuation professionals for guidance in appraising railroad corridors, the Appraisal Institute, the Appraisal Institute of Canada and the International Right of Way Association have joined together to develop this long-awaited text," 2018 Appraisal Institute President James L. Murrett, MAI, SRA; 2018 Appraisal Institute of Canada President Peter McLean, AACI, P. App; and 2018/2019 International Right of Way Association President Jeffrey L. Jones, SR/WA wrote in the book's foreword. "Practitioners with an interest in corridor valuation and experience in this challenging area of appraisal practice should find the topics explored and the insights provided in this text to be illuminating."

"Corridor Valuation: An Overview and New Alternatives," explores the controversial issues surrounding railroad corridors, with definitive information on the evolution of corridor valuation theory, related property rights and legal issues, and methodologies for valuing railroad, telecommunications, pipeline, power transmission and conservation corridors.

"Corridor Valuation: An Overview and New Alternatives," (ISBN: 9781935328759) is a 240-page soft cover book. It is available for \$50 for the print or PDF version, or \$70 for both. Call 888-756-4624 or [order online](#).

Membership Updates – Florida Gulf Coast Chapter

Congratulations New Designated Member:

Krystal Kafka, AI-RRS, Sarasota
Charles M. Seney, AI-GRS, Winter Haven
Byron Torres, MAI, Port Charlotte

Candidates for Designation:

Abigail Stevens, Tampa

Status Change:

Kirsten Hoffman Philip (candidate to practicing affiliate)
Andrew D. Anderson (candidate to practicing affiliate)

Members Transferred In:

Timothy J. Powell, MAI, SRA, Tampa
Bruce H. Schuette, SRA, Estero (*from VA*)

New Practicing Affiliate

Jonisha Kowalski, Tampa
James Butler, Tampa
Ryan E. Monroe, Tampa

New Affiliate:

Jesse A. Larson, Tallahassee
Tara Smith, Champions Gate

Member Retired:

R.David McKenzie, SRA, Sarasota
Michael McKinley, SRA, Clearwater

Members Resigned

Ceilia P. Epner, Sarasota
Keith B. Hodges, MAI, Pensacola
Amanda McDaniel, Panama City Beach
Jennifer H. Mead, Pensacola

Semi-Retired:

Lee F. Pallardy, III, Tampa
J. William Walch, MAI, Sarasota

Deceased:

John D. Peppi, MAI, Tampa
D. Curtis Hinckley, MAI, Brandon

2019 Nominating Committee – Florida Gulf Coast Chapter

The selection of the five-member nominating committee will need to be completed at the March 25th 1st Quarter chapter meeting in Tallahassee, FL. This committee is charged with preparing a slate of nominees for the position of 2020 officers, directors and regional representatives for the **Florida Gulf Coast Chapter**.

The 2019 nominating committee will be chaired by immediate past president, Wesley Sanders, MAI, AI-GRS. In accordance with our Bylaws, our 2019 chapter president, Julie Battaglia, has appointed one member and the Board of Directors has appointed one member to the nominating committee at their recent board of directors meeting held in January. The two members who were appointed were: Gerald Hendry, MAI and Sandy Adomatis, SRA. The chapter designated members, candidates, practicing affiliates and affiliates in attendance at the March chapter meeting will nominate and elect the remaining **two** members to the nominating committee. This committee will prepare a slate of 2020 nominees. If you have interest in serving on the nominating committee, please notify Wes Sanders prior to March 25th.

Note—if you are interested in being considered for a 2020 chapter board position, you cannot serve on the nominating committee.

IF YOU ARE INTERESTED in serving on the chapter board in 2020, here is your opportunity. Please go online and complete the Chapter Leadership Resource Registry at: http://www.appraisalinstitute.org/membership/ai_volunteer.aspx as soon as possible. It would also be helpful to contact Wes to express your interest prior to the March 25th chapter meeting. Please consider getting involved with your chapter. If you have any questions, please contact Wes Sanders or the chapter office.

Wesley Sanders, MAI

Email: wsanders@nationalapg.com
2019 Nominating Committee Chair
Florida Gulf Coast Chapter

Member Spotlight



Congratulations to new MAI, **Byron Torres** from Port Charlotte, FL.

Where do you work? How long?

I have worked at Capstone Valuation Advisors for 4 years.

How did you get started in the business?

While at FGCU I took a real estate investment course that introduced me to appraising. The following summer (2011) I completed the requirements for the trainee license. A month later, Michael Jonas, MAI sent an email to the FGCU real estate department looking for a student intern to work at Integra Realty Resources. I submitted my resume, went in for an interview, and the rest is history.

What type of appraisal work do you do?

The majority of my work is completed for bank clients. The properties I work on consists of commercial properties, multi-family, and residential subdivisions.

How has your practice changed in recent years?

I was able to increase my productivity due to utilizing less verbal content and more visual aids such as charts and graphs. There has also been significant improvements to work from home and access work files electronically while on inspections that allows for quicker turnaround on reports.

Who/what is the biggest influence for you in getting the designation?

The biggest influence for me was the ability to grow and become a better appraiser. Also, receiving the MAI designation provides confidence in my clients that I am providing top quality work.

Hometown?

Allentown, PA

Favorite Hobby/Activities?

My favorite hobby is going to the gym and anything that has to do with cars. I also love riding my motorcycle.

What advice can you give to other candidates and practicing affiliates letting the demo hold them back from receiving their designation?

There's nothing to it but to do it! The appraisal institute has a great Capstone program that holds you accountable with deadlines. This is the route I took and it really makes you work to meet the deadlines. Have confidence in yourself and set goals along the journey that are obtainable and realistic.

Any other advice you can pass along to candidates for designation and practicing affiliates?

Do not allow the number of courses, exams and the demo discourage you from completing the designation. It will take time and money, but just take it one obstacle at a time with the final goal of your designation in mind. It will all be worth it in the end!!

AI Benefits

Are you taking advantage of the benefits that the Appraisal Institute has to offer?

Designated Members, Candidates for Designation and Affiliates have access to exclusive discounts and an insider connection to exciting Appraisal resources:

- Insurance
- Education
- Business Tools
- Marketing & Publications
- Valcre
- Travel
- AI Services
- Networking & Leadership Development
- Taxbot (Automobile Mileage & Expense Tracking App)
- STDB

[Learn More](#)

Club Quarters— as part of the Club Quarters network, AI professionals are able to take advantage of savings on hotel costs. You, your family, and friends can enjoy their prime locations and unique services at subsidized rates on weekends and holidays. For reservations and more information, visit Club Quarters and enter the Member ID Appraisal for exclusive rates, go to: <http://clubquarters.com/>.

Valcre—The Appraisal Institute is excited to introduce **Valcre** as a new AI benefit. This innovative and intuitive appraisal technology platform is now available to all Appraisal Institute Professionals at a special AI discount of 10 to 20% off a monthly subscription based on subscription plan package. Learn more at sales@valcre.com.

STBD—Site to do Business is now live. STDB is poised to move towards the future by continuing to provide analysis tools for commercial real estate users and searching for new and innovative products to add to their tool kit.



Become an Advisor! We need designated members to step up and become an advisor. Please consider applying to serve as an Advisor in the Candidate for Designation Program. Once you have applied and are approved as an Advisor, the national office will place you on a list of approved Advisors. We currently have 31 designated members who are approved advisors, however there are only few of these advisors who have remaining slots available. We currently have a total of 62 candidates.

A Candidate may request a particular Advisor or the Appraisal Institute will identify a potential Advisor for the Candidate and make the assignment. The Appraisal Institute will make the final approval as to who will serve as the Advisor for a specific Candidate. **Candidates: Don't delay—choose your advisor today!**

An Advisor can receive up to 125 points of CE credit per AI CE cycle for service to the Appraisal Institute. Please notify the Admissions Department of your interest at admissions@appraisalinstitute.org. A free online orientation is available for potential advisors. Advisors serve as a resource to the Candidate, providing knowledge and expertise.

[Download the PDF that will explain the process.](#) **WE NEED YOU !**

For more information on the Appraisal Institute candidate advisor program, please contact the Admissions Department at admissions@appraisalinstitute.org or [click here](#).

Advisors & Candidates: Remember to check your Appraisal Institute account page online to check your status and/or record your contacts.

Dinner & Installation — November 4, 2018, 4th Q Meeting, St. Petersburg And Regional Meetings, Orlando



AI-GRS Designation Certificate presented to Carolyn Holman by Wes Sanders



New MAI J. Bruce Cumming, Jr. Receiving his Certificate in November



MAI Certificate presented to Byron Torres, MAI



New SRA Scott Norris at November meeting



Installation of 2020 Chapter Leadership at the 4th Q Meeting in St. Petersburg with Rick Borges MAI, SRA officiating



Presentation of plaques to outgoing chapter president Wes Sanders by incoming president Julie Battaglia



Region X Breakout Meeting in February 2019 with Florida region representatives



(l) Joint region meeting held in Orlando in early February.

(r) Florida Gulf Coast Chapter Region Representatives at Orlando meetings



Region and chapter executive directors representing ten AI chapters attending joint region meeting in Orlando FL

1st Quarter Meeting of the Florida Gulf Coast Chapter March 25 and March 26, 2019 - Tallahassee, FL

Please join us for the 1st quarter chapter meeting & other events!

Location

Four Points Sheraton Downtown Tallahassee
316 W. Tennessee Street, Tallahassee, FL

Schedule of Events

Monday, March 25, 2019

- 1 PM - 1:15 PM Brief Chapter Business Meeting
1:15 PM - 3:30 PM: Residential and Commercial Round Tables
4:00 PM—6:30 PM: Craft Brewery Real Estate Valuation | Tour of Brewery (2 Hours CE)

Fees (Early Registration Discounts available until March 15th)

VALUEvent Package: \$29 Members | \$49 Nonmembers [includes 2-hour seminar, round tables and lobbying event]

Chapter Meeting & Roundtables: No Charge

Craft Brewery Real Estate Valuation ONLY: \$65 Members | \$80 Nonmembers

Tuesday, March 26, 2019

8:00 AM—9:15 AM : **VALUEvent** Breakfast Meeting at Four Points Sheraton followed by Lobbying at State Capital

Directions to hotel: (from Tampa Area)

- Take I-75 North to I-10 . Follow Interstate 10 West.
- Take Exit 209A / US 90 West and continue 8.2 miles.
- Turn left onto Monroe Street. And then left onto Tennessee to hotel on the right.

**CLICK TO REGISTER
SIGN UP EARLY FOR DISCOUNT**

Sleeping Rooms at Four Points Sheraton - [Click Here](#)

Group room block available until March 4th

Registration Application — March 25 —1st Q Chapter Meeting & Other Events

Name _____

Firm _____

CC Billing Address & Zip Code _____

City _____ State _____ Zip _____

Email _____ License # _____

Phone _____

Payment: **Circle One:** Visa - MC - Amex - Discover - Check CCV digits: _____

Credit Card: # _____ Exp. Date _____ CCV: _____

Name on Card: _____

R.S.V.P. Required!

Mail or Fax Registration to:

Florida Gulf Coast Chapter - AI

Tampa, FL 33618

T 813-962-4003

Questions? wcoastfl@tampabay.rr.com

Register Early and Save....fees increase 3.14.19

[Register Online Here](#)



Florida Gulf Coast Chapter of the Appraisal Institute
P. O. Box 273994, Tampa, FL 33688
Phone: (813) 962-4003 • Website: <http://www.gulfcoastai.org>