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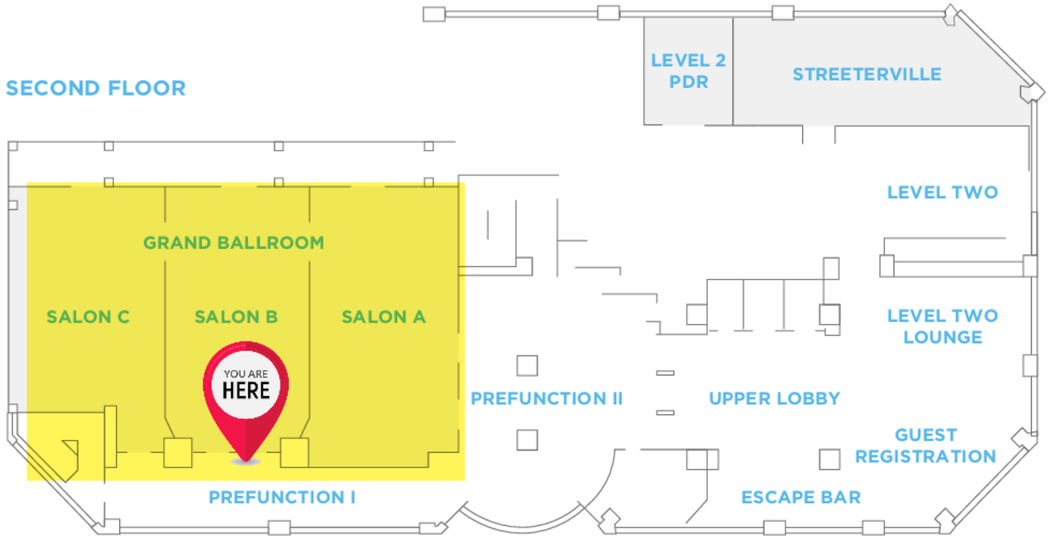
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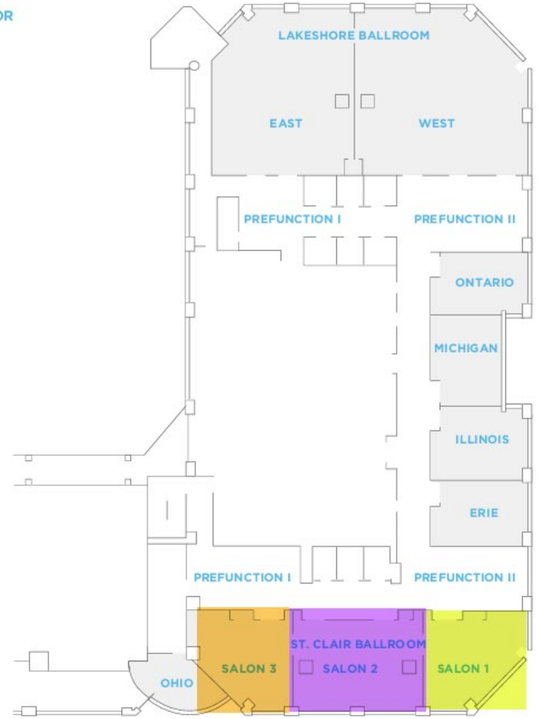
Welcome, chapter leaders.

Wifi and Map

Username: Hyatt_Conf
Password: Hyatt2026

FLOOR PLANS





Today's Agenda

Friday, October 23 – Chapter Education & Growth

Time	Title	Presenter/Facilitator
7:00 a.m.	**Networking Breakfast**	
8:00 – 9:45	Chapter Education: What Chapters Need to Know Going into 2027	Maureen Mahoney, Director, Education Resources Magdalene Vasquez, Director of Compliance
9:45	LDAC: Looking Ahead to 2027	Erica Butler, MAI, 2027 LDAC Discussion Leader Jon Westercamp, MAI, 2027 LDAC Alternate Discussion Leader Ashley Johnson, MAI, SRA, President-Elect
10:00	Break	
10:15 – 11:30	*Beyond the Presentations: Ask the AI Team, Collaborate and Plan for 2027*	
11:30	Closing Remarks and Adjournment	Ashley Johnson, MAI, SRA, President-Elect

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Chapter Education: What Chapters Need to Know Going into 2027

Maureen Mahoney, Director, Education Resources

Magdalene Vasquez, Director of Compliance

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HOW WE'RE ORGANIZED

Two Leads, One Process

Maureen Mahoney
Director, Education

Education Development
Courses, curriculum, new content

AI PAREA
LR & CR Program

Maggie Vasquez
Director of Compliance Operations

Compliance & State Approvals
AQB, IDECC, state filings

Education Delivery
Scheduling, registration, rosters

Instructors
Approval, scheduling, instructor support

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YOUR CONTACTS

Who to Call

You need to...	Contact
Schedule a course, set up registration, get a roster	**Education Delivery**
Get a course or instructor approved in your state	**Compliance**
Report a problem during or after a class	**Education Delivery**
Find an instructor, or recommend one for IQC	**Education Delivery**
Course content, new courses, or a course idea	**Education Development**
Engage AI PAREA participants	**AI PAREA Team**

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Education Update

What we released in 2026 and what's coming in 2027

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THIS YEAR

2026 Education Overview

Released in 2026

Analyzing Defects, Damages & Deficiencies

Analyzing & Reporting the Income Approach in the New URAR

Countdown to UAD 3.6 Series

AI on AI Season 2 & Season 1 Replay

2026-27 USPAP courses
15-Hr & 7-Hr, classroom & online

Valuation Overview of Accessory Dwelling Units
Online, 7 hr CE

General Appraiser Report Writing & Case Studies
Online, 30 hr QE

AI PAREA LR v2

Premiered - Releasing Soon!

Appraising Senior Housing and Nursing Homes
Classroom / synchronous, 7 hr CE

Valuing Solar PV: Methods, Market Support, and Free Tools
Classroom / synchronous, 4 hr CE

Coming by year-end

Applied Excel for Real Estate Appraisers
Online, 7 hr CE

Appraising Religious Facilities
Online, 4 hr CE

Residential Upzoning for Residential Appraisers
Online, 4 hr CE

Cost Approach & Site Valuation in the New URAR
Classroom / synchronous, 4 hr CE

Q1 2027 Premieres

Diminution in Value
Classroom / synchronous, 7 hr CE

Analysis of Data Centers and Powered Land
Classroom / synchronous, 4 hr CE

Valuation Bias and Fair Housing Regulations
Online, 4 hr CE

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THIS YEAR

UAD 3.6: The Companion Suite

Appraiser's Guide to the New URAR	Released 2025
Supporting Adjustments & Reporting the Sales Comparison Approach	Released 2025
Reporting Market Analysis & Understanding the New URAR	Released 2025
Analyzing Defects, Damages & Deficiencies	Released 2026
Analyzing & Reporting the Income Approach in the New URAR	Released 2026
Valuing Solar PV: Methods, Market Support, and Free Tools	To chapters next week
Cost Approach (final companion course)	Nov 10 synchronous premiere

Countdown to UAD 3.6

Webinar series

312

registrants so far

Tue, Oct 27

Mark Ratterman and Danny Wiley (Freddie Mac)

Tue, Nov 10

Post-go-live FAQ: Sean Murphy, Freddie Mac

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ON THE HORIZON

Premiering in 2027

Classroom & synchronous

Diminution in Value 7 hr CE

Analysis of Data Centers and Powered Land 4 hr CE

Highest and Best Use: An Eight-Step Process, Concepts and Application 7 hr CE

Valuation Bias and Fair Housing Regulations 4 hr CE

Sensitivity Analysis in Residential Valuation 2 hr CE

Diagnosing Weak Valuation Evidence (GenAI/data analytics) 3 hr CE

Artificial Intelligence and the New Expert Workflow (GenAI/data analytics) 4 hr CE

Online

Valuation Bias and Fair Housing Regulations 4 hr CE

Essentials of Effective Communication 3 hr CE

Basic Appraisal Principles 30 hr QE

Basic Appraisal Procedures 30 hr QE

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Our Approach to GenAI Education

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GENAI

How We Got Here

1

Where it started

Artificial Intelligence, Blockchain, and the Metaverse: Implications for Valuation

Mark Linne's course

2

AI on AI Season 1

Almost 500 registrants

Season 1 replay now available for purchase

3

GenAI workgroup

Formed to build a GenAI curriculum

Because AI on AI showed the need

4

AI on AI Season 2

Launched July 2026

242 registrants so far, 2 sessions left (Nov 17, Dec 15)

5

2027: State CE courses

Diagnosing Weak Valuation Evidence (3 hr CE)

Artificial Intelligence and the New Expert Workflow (4 hr CE)

What AI on AI told us: The pace of change in GenAI was creating significant knowledge gaps, and appraisers needed solid information about how to use GenAI. We needed a cohesive GenAI curriculum plan to coordinate between National and Chapters to deliver a timely and relevant GenAI content to meet the rapidly changing environment.

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GENAI

Durable vs. Perishable Content

Durable

National Leads

Holds its value for years

- Ethics and professional judgment
- USPAP and AI
- Data privacy and confidentiality
- Verifying and documenting AI output

Perishable

Chapters Lead

Changes every few months

- Specific tools and products
- Prompts and templates
- New features and workflows
- What's new right now

New for chapters: Ethical & Responsible Use of GenAI

A ready-to-present PowerPoint for chapter meetings and events, shared with chapters at the end of October.

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New & Existing Instructor Training Update

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INSTRUCTORS | NEW INSTRUCTOR CANDIDATES

IQC: Becoming an Approved Instructor

Before year-end

Applications open

Q1 2027

Virtual presentation & screening

Qualified applicants present a short teaching segment virtually

End of Q2 / early Q3 2027

In-person IQC

Selected candidates attend two days of hands-on training and evaluation

After training

Mentoring, audit, co-teaching, approval

What candidates do at the IQC

1

Classroom-ready practice

Practice extemporaneous-speaking skills, with constructive feedback to get you classroom

2

Live teaching demos

Current instructors model a course segment, including difficult situations and Q&A

3

Teaching skills sessions

Speaking skills, Hybrid Delivery Lab, time management and sensitive topics

4

Mentor matching

Connect with a current instructor to plan the first audit, co-teaching and approval

New and current instructors train side by side in joint sessions on both days. Dates, location and fees are still being finalized.

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INSTRUCTORS | CURRENT APPROVED INSTRUCTORS

IQC: Training for Current Instructors

Before year-end

Registration opens

Q1 2027

Course matching & planning

Staff matches your current approvals to accelerated approval options

End of Q2 / early Q3 2027

In-person IQC

Two days alongside the incoming class of new instructors

After training

New approvals & resources

New course approvals and conference materials posted to the Instructor Portal

What current instructors get at the IQC

1

Accelerated approvals

Faster path to teach QE, DE and CE courses with instructor shortages; counts toward the audit

2

New teaching pathways

Panels on online/on-demand teaching, DE and advanced QE, and becoming a course developer

3

Hybrid Delivery Lab

Hands-on Meeting Owl setup and a mock hybrid segment, plus student-engagement tools

4

Mentor the next class

Model live teaching and meet candidates at the Mentor Match reception

New and current instructors train side by side in joint sessions on both days. Dates, location and fees are still being finalized.

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AI PAREA

Growing the profession and AI membership

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AI PAREA

Your Next Members Are Here

239

current participants

222 Licensed Residential, 17 Certified Residential. 33 are in final assignments.

121

graduates so far

116 Licensed Residential, 5 Certified Residential

75

LR graduates now credentialed

Plus 9 who have since earned Certified Residential

Participant → Graduate → **Associate Member** → Candidate → Designated Member

Goal: convert 70% of graduates into Associate Members. That step happens in your chapter.

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AI PAREA

Find Them: The PAREA Report

AI Account Page → Chapter Portal → Reports → AI Chapter PAREA Participants → View Report

What the report gives you

Names
Every participant connected to your chapter

Contact info
Ready for personal outreach

Program status
Who's enrolled and who's graduated

Membership status
Who's already an AI member

Chapter action: run the report before year-end and reach out to every name on it.

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AI PAREA: TOP WAYS TO ENGAGE

Engage Them

1. Personally welcome new participants and congratulate graduates
2. Invite them to chapter meetings and events
3. Present graduates with a "diploma" at a chapter meeting
4. Start a local PAREA group (WhatsApp, LinkedIn)
5. Set up ride-alongs and shadowing
6. Offer scholarships, events, and conference access
7. Give graduates a voice in chapter leadership

North Carolina

Invited 350+ participants and graduates to a business webinar, with free admission to the 2026 Residential Valuation Conference

Colorado

Monthly outreach from the report, a PAREA WhatsApp group, ride-alongs, and graduates at board meetings

National provides the pathway. Chapters provide the community.

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The Chapter Education Playbook

One source of truth for running chapter education

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THE CHAPTER EDUCATION PLAYBOOK

13 Lessons, Built for Chapter EDs

1. Understanding the Education Network
2. Know Your Education Products
3. Compliance Essentials
4. Planning Your Education Calendar
5. Course Approval & Scheduling
6. Budgeting & Financial Management
7. Instructors, Sites & Logistics
8. Technology, Hybrid & Synchronous
9. Marketing Your Programs
10. Registration, Rosters & Student Experience
11. After the Program
12. Tools & Support from National
13. Your First 90 Days

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THE PLAYBOOK BETA

Help Us Get It Right

Nov
Cleanup and updates

Dec
Beta review: Lessons 1-5

Jan
Lessons 6-13 and new resources

Feb 2027
Released to every chapter

Beta reviewers

- We'll reach out to representatives from small, medium, and large chapters
- Review a few lessons: is it accurate, what's missing, would you use it?
- Credited as founding contributors

Coming in the beta

The source of truth for AI chapter education

- In-the-moment response guide for synchronous producers
- Engaging your AI PAREA participants
- Who to contact, kept current in one place

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THANK YOU

Questions?

Education Compliance

2026 Overview – Chapter Leadership Program

Magdalene Vasquez, Director of Compliance

Fragmented Regulatory System

*"The Appraisal Subcommittee **shall encourage** the States to accept courses approved by the Appraiser Qualification Board's Course Approval Program."*

- **FIRREA Title XI § 1122(h), 12 U.S.C. 3351, as amended by the Dodd-Frank Act**

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What is Education Compliance?

Content	Federal/State
Approval	School, Course, Instructor
Delivery	“Successful Completion”

Course Content

Federal

- AQB *Real Property Appraiser Qualification Criteria*
- AQB Course Approval Program
- International Distance Education Certification Center (IDECC)

State

- State Law Courses
- Minimum Exam Requirements
- Specific QE Electives



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Course Content: Example

“The examination bank must contain at least 25 items for each 15-hour segment of course time. The order of the examination questions may not follow the sequence of the course content…At least 70% of the questions on each form of the test shall be at the application level or higher. No more than 10% of the questions on each form of the test shall be at the knowledge level. The examination shall comply with the Item Writing Guidelines as of January 29, 2004…”

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Course Approval & AI Curriculum

AI Curriculum: 85 Courses

Format Types

- 58 Classroom/Synchronous
- 47 Online

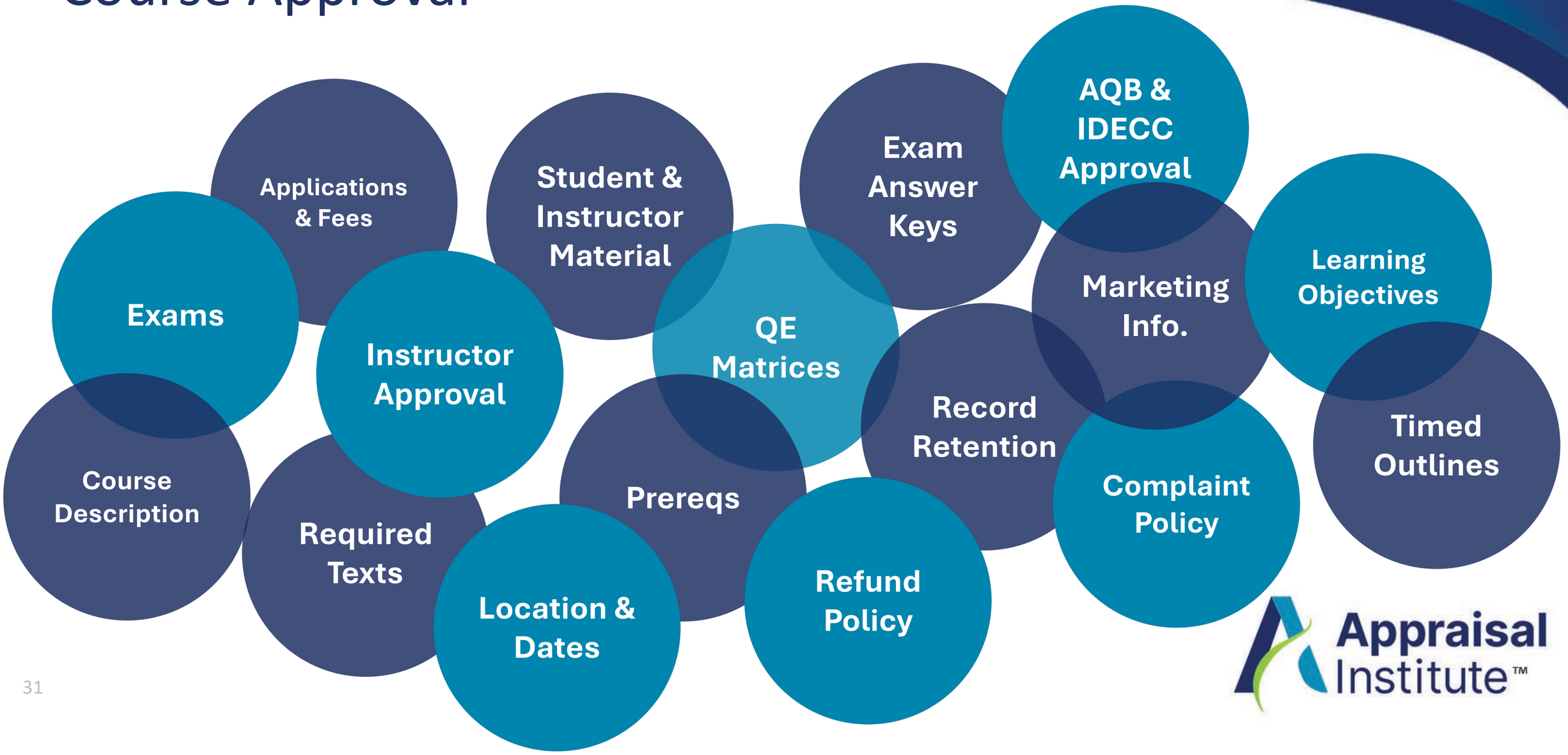
Credit Approval Types

- 26 Qualifying Ed (QE)
- 11 Continuing Education w/Exam (CE/E)
- 48 Continuing Education (CE)



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Course Approval



New Course Approval Timeframe



Approval Cycles and Cost

Course / Instructor Approval Cycles

- “X” Timeframe from Date of Submission
- Annually – every 4 years

Approval Fees

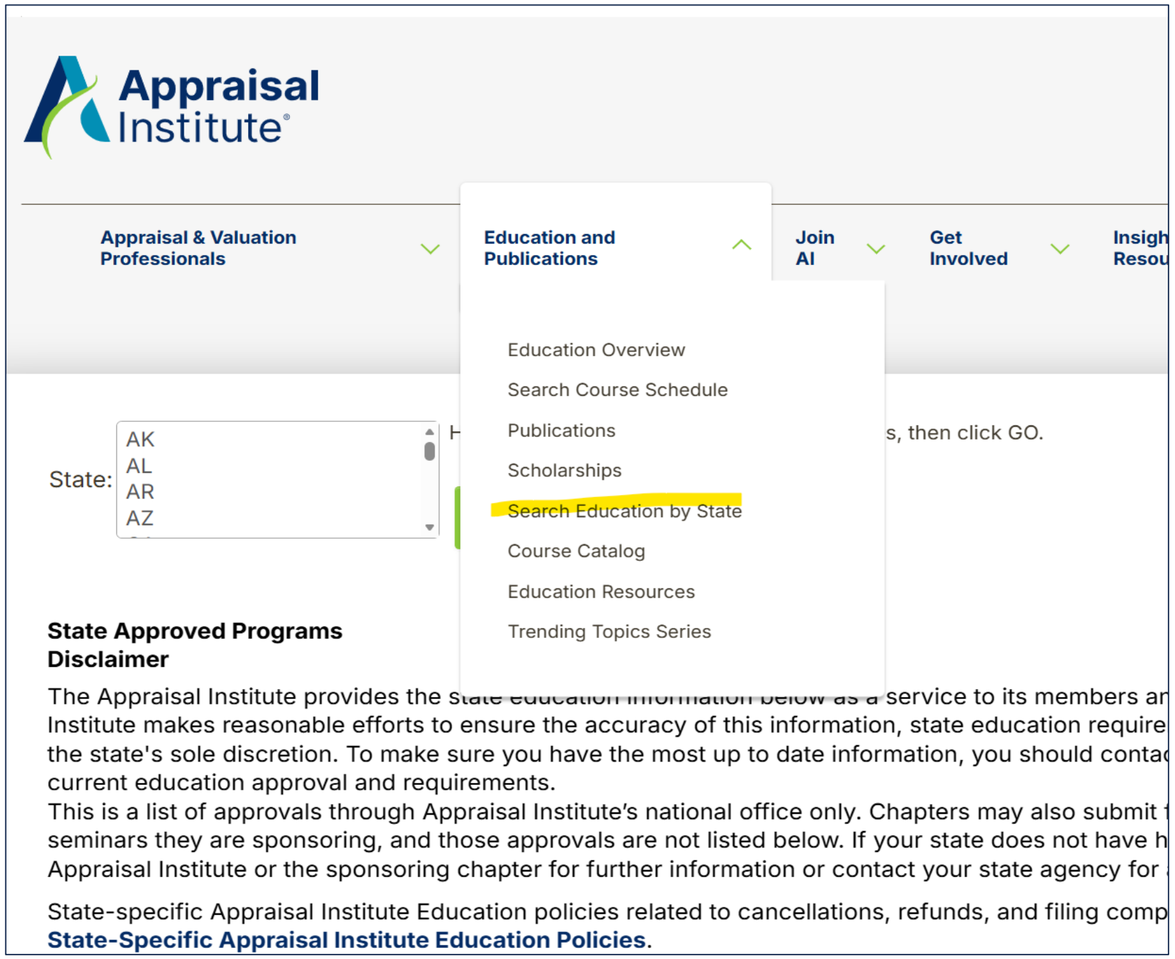
- New QE: $6,210 - $7,588 (15 - 30 hrs)
- New CE: $4,905 - $6,233 (2 – 15 hrs)
- Instructors: $0-$150

AQB CAP Approval (since April 2025) = $71,545

Renewal fees are often cheaper but vary by state.

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Where Can I Find Approvals?



Contact Us!

statecert@appraisalinstitute.org

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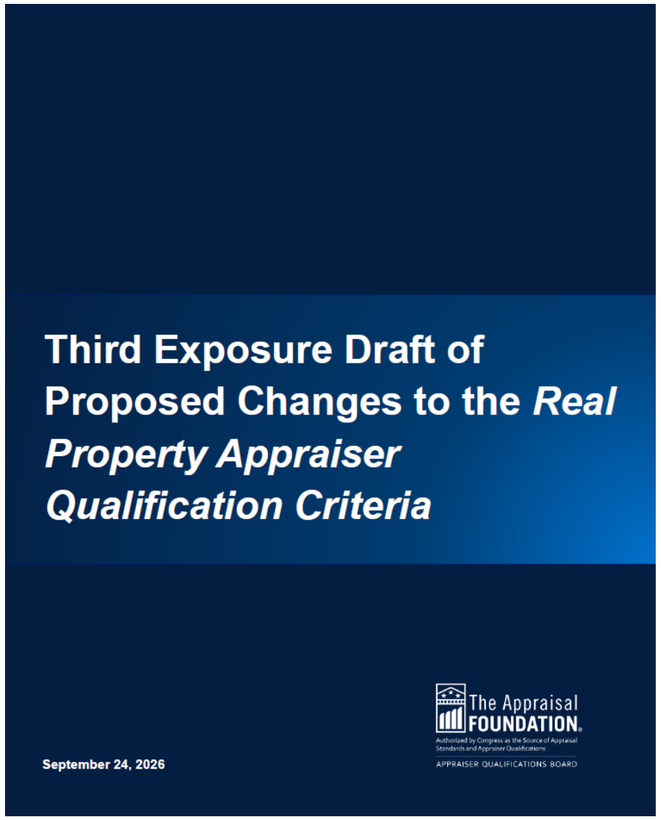
Course Delivery & Compliance

Regulatory Compliance + Internal Risk Tolerance

- 100% Attendance – No Exceptions
- Synchronous Course Management
- Exam Proctoring
- ADA Requests
- Completion Certificates / Roster Reporting
- Internal and External Policies & SOPs: Record Retention, Instructor, Attendance, Exams
- Course Audits, Scheduling

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Regulatory Update



Comment Deadline: 10/25/2026

www.appraisalfoundation.org

Click on “Get Involved” and “Exposure Drafts”

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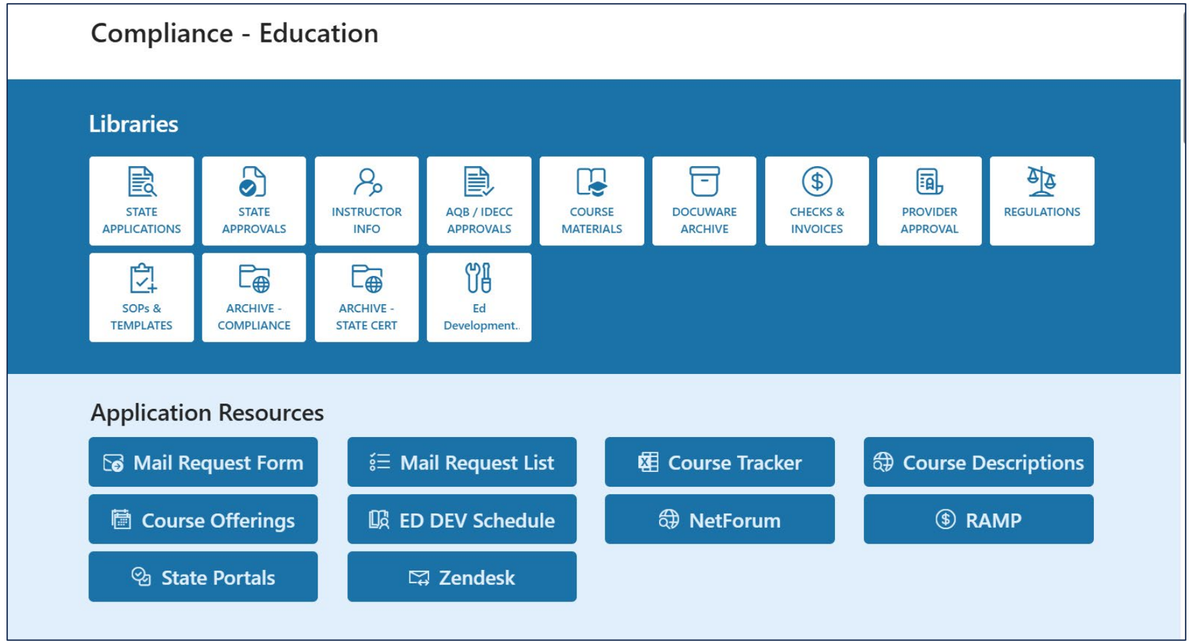
Challenges, Opportunities/Focus

Challenges

- State-specific minutiae
- State regulator turnover
- Staff turnover and training
- Internal data integrity

Opportunities/Focus Areas

- Re-evaluate/Adjust Goals
- Relationship Building: Internal/External
- Workflow Efficiency / Technology
- State Audits
- Regulatory Monitoring & Documenting
- Cross-Training
- Policies and SOP “Refresh”



Resources

Education Delivery & Compliance

Magdalene Vasquez, Director
mvasquez@appraisalinstitute.org or 312-335-4217

Compliance

- Melanie Loucks, Manager
- Liz de Kanter
- Wanda Martin

Delivery

- Candice Adams, Manager
- Rebecca Hiddle
- Justine Synstelien

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LDAC: Looking Ahead to 2027

Erica Butler, MAI, 2027 LDAC Discussion Leader
Jon Westercamp, MAI, 2027 LDAC Alternate Discussion Leader
Ashley Johnson, MAI, SRA, President-Elect

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LDAC 2027

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Grow your leadership. Strengthen your voice.

Leadership Development and Advisory Council (LDAC)

SAVE THE DATE

May 26–28, 2027 | Washington, DC

Explore LDAC 2027. Registration opens February 2027!



LDAC
LEADERSHIP DEVELOPMENT AND ADVISORY COUNCIL

Scan to explore

- **Groups broken into:**
  - **Small Chapters <150 members**
  - **Medium Chapters 151-350 members**
  - **Large Chapters >350**

St. Clair Ballroom –Salon 2 Room

- **(Large)** - Atlanta Area, Chicago, Colorado, Florida Gulf Coast, Houston, North Carolina, North Texas, Northern California, and Southern California Chapters

St. Clair Ballroom –Salon 3 Room

- **(Medium) -** Alabama-Mississippi, Central Texas, East Florida, Great Lakes, Greater Oregon, Hoosier State, Louisiana, Massachusetts Rhode Island and Maine, Metro New Jersey, Metropolitan New York, North Star, Ohio, Philadelphia Metropolitan, Phoenix, San Diego, Seattle, South Carolina, South Florida, Tennessee, Utah, Virginia Commonwealth, Washington DC Metropolitan Area, Washington Idaho Montana, and Wisconsin Chapters

St. Clair Ballroom –Salon 1 Room

- **(Small) -** Alaska, Arkansas, Austin, Bluegrass, Connecticut, Delaware, Greater Kansas State, Greater St. Louis, Hampton Roads, Hawaii, Iowa, Kansas City, Keystone, Long Island, Maryland, Mid-Hudson, Nebraska, Nevada, New Hampshire – Vermont, Northeast Florida, Northeast New Jersey**,** Oklahoma Ozark, Puerto Rico and Caribbean, Rio Grande, Savannah Area, South Texas, Southern Arizona, Southern New Jersey, Upstate New York, Western Pennsylvania, and Wyoming, North Dakota, and South Dakota

Breakout Rooms

