

Potential Areas of Cooperation and/or Alliance Between ASA, AI and ASFMRA

From a Joint Staff Meeting Conducted
Monday, May 12, 2003

Order is not an indicator of preference or priority.

Education

- **General appraisal course marketing**

In addition to the course-specific or other more targeted marketing that each organization does, conduct a joint marketing campaign that markets the courses of all involved associations, presenting a unified “across-the-valuation-profession” package of courses to fit identified needs in the market. This could take the form of a combined educational offering/resources catalog, organized by discipline and category rather than by association.

- **Joint education Web site**

This could be as simple as a page with links to all participating appraisal associations or as complicated as an "Appraisers Education Toolbox," "Appraisers Research Center" or "Appraisers Resource Center" mega-site. Could be connected to a state certification site that shows where and what is approved.

- **Joint state certification**

State certification is something all the associations do that need not be replicated. Join operations to eliminate duplication.

- **Specialization in areas of educational expertise**

Directors of education would specialize in delivery systems of education programs, i.e., classroom, online, audio, etc. This would allow a depth of knowledge and level of expertise in important areas that these staff are unable to achieve now as busy generalists. It would also reduce replication of research, etc.

Government Relations

- **Expand joint government relations program**

Add ASFMRA to joint AI-ASA government relations program for real property. Also, expand and fine-tune the government relations cooperation to encompass an RP-related government relations joint Web site.

- **Develop a joint state government relations program**

Make a joint investment in some kind of system for getting news about state government activities to members in those states (e.g., State NET or similar service that chapters can tap into). AI has explored it before and it would be very valuable, but very expensive. Combining resources might make this possible.

Public Relations

- **Joint public relations program for appraisal profession**

Establish a “baseline” professionwide public relations program to support “designated appraisers” that would underlie (or overarch) the PR programs of each appraisal association. There are 80,000 real property appraisers in the United States and another 30,000 +/- valuers in other disciplines. Of those, only 25% belong to the involved organizations and only 15% are designated.

The societies are in the process of developing repetitive public relations programs: ASA is furthest along the road, followed by AI, and ASFMRA is just starting. These programs—especially in these early stages--could efficiently be combined into one, with adjunct programs (if desired) for each association.

Publications

- **Joint RP journal**

AI has a successful and professional RP journal. The other societies could cooperate with AI to offer this to their own RP members.

- **Joint appraisal profession journal**

Develop a publication that crosses disciplinary boundaries, whether a professional journal or a more practitioner-oriented publication.

- **Joint “best of” journal**

Develop a “best of ...” journal drawing from current and seminal work in each discipline, i.e., a journal where each discipline can highlight issues, concepts and theoretical developments that every other discipline should recognize.

- **Joint, personalized appraisal magazine/newsletter**

With today’s technology, it would be possible to develop a single valuation magazine carrying content individually selected according to the discipline, practice interests and other characteristics of each reader.

Directory

- **Joint directory**

Both AI and ASA are pursuing the MultiView directory program. Explore the benefits of collaborating in this pursuit with each other and with ASFMRA.

Membership/Administration

- **Joint retention efforts**

Explore means of encouraging member retention, i.e., a common “Why join a designation-track organization?” publication. One of the challenges every organization faces is that—in light of licensing and certification—the benefit of designations (and designation-awarding associations) is being increasingly questioned. The organizations may be well-served to collaborate on a program that explains and supports the benefit of belonging to a professional society.

- **Joint call center and referral system (voice)**

Explore benefits of a joint call center and referral system (voice).

- **Joint admissions/accreditation administration**

Evaluate handling the administrative management of admissions or accreditation processes under common management. These processes are similar and often labor intensive (tracking, monitoring and reporting status), and there may be efficiencies in using a common system.

- **Joint affinity programs**

Each organization offers various “member service” programs such as E&O insurance, health insurance, business referrals, chapter-based programs, library and research services, etc. Efficiencies may be realized through combining at least some of these programs across organizations. Enhanced member benefits and/or reduced costs may be possible as a result of larger participant bases and/or bulk buying opportunities.

- **Negotiated access and direct connection to AI databases of residential/commercial sales**

AI has databases of residential and commercial property sales that are a valuable resource for RP appraisers. ASA and ASFMRA could negotiate access to those databases for their RP members as a member benefit.

- **Joint reaccreditation database for members of multiple appraisal associations**

Establish a central database to serve members who are affiliated with more than one organization.

As much as 20% or more members may belong to two or more of the involved societies. We create a barrier for these members by requiring that they report essentially the same information to several organizations, as well as increasing the costs to the members and to the organizations. This could be resolved by establishing one database where the member could input information that would be reported to all the organizations with which they are affiliated.

- **Common membership database**

Establish one, common membership database, with appropriate security provisions to ensure that “raiding” does not occur. A common database would help significantly with supporting members and with coordinating programs.

Meetings

- **Central meetings databases**

Centralize data collection and recording for meeting attendance utilizing a common meetings management program. This would offer efficiencies and opportunities for enhanced member service.

- **Joint small educational meetings/conferences**

Consider holding more smaller-scale joint meetings focused on education, and specifically on topical issues that may cross organizational and/or disciplinary boundaries. Where no one of the associations has sufficient mass to support, say, a Timber or a Intangible Asset conference, across the combined organizations there may be critical mass. Also, these programs could focus on specific client groups (e.g., in the mining and petroleum sector or in mark to market) where valuers from different disciplines may work together).

Chapters

- **Collaborative chapter efforts**

Explore more collaborative efforts between association chapters. Collaborative chapter efforts enhance networking, events, revenue and thus value of chapter membership. Also explore joint strategies for virtual chapters.

Strategic Planning

- **Joint strategic planning activities**

How does the profession figure out what to do about issues affecting the whole appraisal profession—issues such as accounting standards, mark-to-market, etc.—appraisal issues affecting more than one discipline. Societies need to cooperate on these issues and this kind of planning if they are to survive. The means to accomplish the planning could range from summits to joint meetings of special committees to leadership conferences.

Human Resources

- **Joint arrangements for staff benefits**

Explore further the possibility of cooperating in contracting for staff insurance, staff training (explore membership in CESSE, for example) and other staff benefits. Joint contracting for staff training could create the buying power necessary to obtain enhanced benefits or reduced costs.

Other/General

- **Joint professional practice recommendations**

Creating a joint code of ethics is not a new idea, but it is a good one. Common counseling and professional practice recommendations also would be very useful to our members and to the profession.

- **Joint outsourcing**

Explore joint outsourcing of course/seminar development or warehousing services or any other service that the associations currently outsource. We may be able to achieve operational efficiencies and increase our buying power by combining our resources and operations.

- **Joint appraisal profession library**

Explore consolidation of the appraisal libraries of the three associations.

Friday, July 25, 2003