
1st Quarter 2022 Newsletter & Updates

President's Letter

**Jacinto Munoz MAI, SRA, AI-GRS, AI-RRS
2022 SCCAI President**



I welcome our membership to 2022! I hope this message finds you, your families, and your loved ones safe and healthy. I want to thank you for the opportunity to serve as the 2022 President of the Southern California Chapter of the Appraisal Institute ("SCCAI"). As we celebrate our 90th anniversary, we will continue to push forward stronger than ever as the largest Chapter of the Appraisal Institute. This chapter's deep and rich history is made even stronger with the addition of the Central California Chapter to the SCCAI family. This tremendous accomplishment could not have been achieved without the fantastic leadership found within the former Central California Chapter as well as our 2 past presidents, Steve Henry, MAI and Casey Merrill, MAI. As we begin to return to some level of normalcy (fingers crossed), I want to thank our past board members for helping us navigate the turbulence and volatility that confronted our organization with the onset of the COVID-19 pandemic. Casey and Steve did not have the opportunity to engage with the membership as much as they would have liked but due to their quick and strategic decision making, we stayed on track relative to educational offerings and operational excellence, and we owe them a massive THANKS!

The year started off a little mixed, with our Installation Dinner being held in person but as things turned, we quickly pivoted and ultimately decided to host the LA/OC Market Trends Seminar virtually. The Installation Dinner was well attended with 83 people, which was likely due to the amazing Installing Officer, Michael Tidwell, SRA. After such a long time in isolation, it was incredible to see so many friends, family, and current and former colleagues again in person. There were many others who passed along well wishes and wanted to attend but made personal decisions not to, given the increased risks of the Omicron variant. Nevertheless, despite all of the circumstances ongoing at the time, I owe Michael an enormous debt of gratitude for accepting the huge task of being the Installing Officer. In typical Michael fashion, he made this an unforgettable and fun event!

As indicated, we shifted the format for this year's LA/OC Market Trends Seminar in January, which had 118 attendees in all. As with previous years, this seminar was filled with fantastic information and great speakers. We would like to thank Orell Anderson, MAI, Jason Borrás, and Michael Eggleston, MAI for their leadership in putting this fantastic event together. The first in-person offering this year started with a bang, which can be a little weird to say when describing a USPAP class. However, our chapter's own Michael

Mason, MAI, SRA continues to pack in the crowds for this offering, which was held in February and had 52 attendees. Ultimately, whether in person or virtually, we must be grateful for the dedication of our instructors, as they keep the wheels on our top-notch education. Speaking of education, I would also like to thank Lianna Ayala for all of the wonderful work that she continues to perform on our behalf in her role of running the chapter office and ensuring that our educational offerings go off without a hitch. In her second year as our Executive Director, Lianna continues to be instrumental in obtaining approvals for the chapter's in-person and virtual seminars through BREAA. Additionally, we have been reviewing some of chapter costs and looking for areas where we can save money, as we did with the move of our chapter office during 2021, and she will be instrumental in navigating the outreach program I discussed at the Installation Dinner and will touch upon below.

It has been absolutely Incredible to see so many people attending our in-person events, and we are currently examining some other opportunities to encourage more participation in the live events. When I originally joined the chapter, educational offerings included "necessities" such as coffee, and we even distributed discount coupons to encourage attendance at local educational offerings. I want to make sure that our members feel like they are appreciated, so more to come on these strategies, but it will be soon!

I would like to thank our Chapter's Board and those leading and serving on committees. Your collective dedication to our chapter is truly valued and appreciated. We are extremely blessed to have these gifted and hard-working members on our 2022 Executive Board:

Vice President – Linda Whittlesey, SRA
Treasurer – Adam Bogorad, MAI
Secretary – Ernesto J. Lopez, MAI, AI-GRS

The 2022 Board would also like to thank Education Chair, Ryan Hargrove, MAI, SRA, AI-GRS as well as our Branch Chairs, Alex Liu, Jan Kelly, and Alex Jaffe, MAI for their time, commitment, and service to this organization. The SCCAI clearly has a rich heritage and tradition of service. As such, I would like to once again thank our Immediate Past President, Steve Henry, MAI for his commitment, leadership, and desire to keep the SCCAI operating at top efficiency.

The larger Appraisal Institute organization approved the Strategic Plan that will guide the organization's efforts in 2022, and beyond. The Board approved the overall Strategic Plan at its August 2021 meeting, and the strategic planning process included input from AI professionals who responded to surveys regarding membership needs. As previously announced, the Strategic Plan includes the following four goals:

- The Appraisal Institute will protect and improve the value of affiliation.
- The Appraisal Institute will provide leadership toward a unified and inclusive profession with diverse perspectives.
- Appraisal Institute professionals will be consistently sought out by users of valuation services.
- The Appraisal Institute will improve the diversity of its affiliated professionals.

These goals truly align with much of what I believe resonates with our membership as well as what I outlined as objectives for the Chapter, which include creating and sustaining a more diverse and inclusive Chapter, increased collaboration and cooperation with other local professional organizations, continued promotion of designations, recognition of accomplishments and milestones of chapter members, and not only attracting new appraisers to the profession but forging the much need mentor/mentee relationship. Too often we try to "expand the tent", but do not connect the dots, and we will strive to do a better job.

For those of you in attendance for the Installation Dinner, you heard a commitment from me to conduct outreach. This outreach is critical for the survival and sustainability of our profession, and I firmly believe that this must start early and be grassroots. As such, you also heard me say that I would like to engage in speaking opportunities at high schools, universities, professional clubs, etc. I really want our board members to connect with people in many of the neighborhoods that I was raised within but more importantly, I want the larger community to witness the level of diversity of thought and background found

within our organization....just look at our Board. Therefore, if there is a specific school(s) that you believe would benefit from us paying a visit, or if you have a contact for such an undertaking, please let us know, as we would love to get things moving on this endeavor. As we look to grow our organization and chapter, I would challenge each of you to reach out to a non-member and invite them to one of the mixers, meetings, or educational offerings our Chapter will host this year, as exposure to our organization is the only way we grow membership. We have some great events on the horizon, so no time like the present!

The future of our Chapter is highly dependent on creating opportunities to develop and mentor incoming talent, and a couple of our greatest tools are the Mason/Thornton scholarship fund and LDAC. I would encourage you all to apply or refer someone to the Mason/Thornton scholarship. Every year a portion of our profits go to this fund, and it continues to grow, so please take advantage of this amazing opportunity. As a multiple recipient and a "recommender", I know how much it helps and how grateful recipients are when it is awarded. As many of you are aware, the Appraisal Institute's Leadership and Development and Advisory Council (LDAC) has had several false starts, but it is full steam ahead this year and will be held from May 18 – 20 in Washington, D.C. Our chapter has been extremely active at LDAC in recent years, with the most recently completed LDAC being Chaired by our own Immediate Past President (IPP), Steve Henry, MAI. I have the distinct privilege of chairing the upcoming event in May 2022. LDAC, without a doubt, has been the most rewarding professional experience during my career. The program involves travel to Washington, D.C. for training and to meet with legislators in Congressional Offices about laws and bills impacting the appraisal profession but more importantly, it fosters conversations for the growth and development of our profession, which impacts us all. We are extremely lucky to have one of the largest LDAC contingents I have seen from a single chapter. In May 2022, SCCAI will be represented at LDAC by the following members:

- Linda Whittlesey, SRA
- Ryan Hargrove, MAI, SRA, AI-GRS
- William Jones, MAI, AI-GRS
- Alex Liu, Candidate
- Michael Tidwell, SRA
- Matthew VanEck, MAI

I look forward to a great and exciting 2022! These are some of the photos from the 90th Annual SCCAI Installation Dinner. Let's create some more opportunities for new photos in the next newsletter by attending upcoming events.

See you all there!



***THANK YOU FOR ATTENDING THE
90TH ANNUAL INSTALLATION BANQUET***





Advanced Land Valuation: Sound Solutions to Perplexing Problems

March 23, 2022
Ayres Hotel,
Costa Mesa, CA

PLEASE CLICK [HERE](#) TO REGISTER

SOUTHERN BRANCH MIXER
(NO-CE for this event)

March 24, 2022
Hive & Honey Rooftop Bar
Irvine, CA

THIS IS A FREE EVENT
PLEASE CLICK [HERE](#) TO REGISTER

SCCAI AND IRWA -LA JOINT LUNCHEON AND PROGRAM
There's a Higher and Better Use - Now What?

March 31, 2022
Quite Cannon
Montebello, CA

PLEASE CLICK [HERE](#) TO REGISTER

SCCAI AND IRWA CHAPTER 57 JOINT LUNCHEON AND PROGRAM
Conducting an Eminent Domain Trial in a Virtual World

April 6, 2022
Old Spaghetti Factory
Riverside, CA

EDUCATION COMMITTEE

2022 Chair:

Ryan Hargrove, MAI, SRA, AI-GRS, R/W-AC

Greetings SCCAI members. I hope you are doing well and having an enjoyable first quarter of 2022. I am Ryan Hargrove, your Education Committee Chairperson for 2022. Education is something that I am passionate about and I am pleased to be able to serve SCCAI in this role. Also serving on the Education Committee this year is Michael Comstock.

The Southern California Chapter is pleased to be able to offer in-person classroom education in 2022. We will be offering "Advanced Land Valuation: Sound Solutions to Perplexing Problems" on March 23, 2022 in Costa Mesa. It will be taught by Stephen D. Roach, MAI, SRA, AI-GRS. Also, please note that "Complex Litigation Appraisal Case Studies," which was originally planned to be delivered on March 24, 2022, is going to be rescheduled to take place in the fourth quarter of 2022.

If you missed the 28th Annual LA/OC Market Trends Seminar, which took place in January of this year, the chapter website (www.sccai.org) has speaker presentations posted. Please refer to the chapter website for the latest information and a complete list of SCCAI's upcoming programs.

Lastly, please keep in mind that the Southern California Chapter encourages members to take advantage of the Mason-Thornton Scholarship Program. The sole purpose of the program is to award financial scholarships to Designated members and Candidates in good standing for courses presented by the Chapter leading to a professional designation in the Appraisal Institute. The chapter website has links to applications for this scholarship program as well as additional national scholarship opportunities. Please make sure you visit the website to learn more about these opportunities.



24th Annual Inland Empire Market Trends Seminar

June 9, 2022

***Doubletree Hotel,
Ontario, CA***

More Information to Follow

Appraisal Institute California Government Relations Committee Update

March 2022

By: Charles Baker, SRA, AI-RRS



On Saturday, March 5th, the Appraisal Institute California Government Relations Committee held its first meeting of 2022, and the first in-person meeting in two years. In attendance were representatives from the Northern California, Southern California and San Diego Chapters, as well as the ASFMRA (American Society of Farm Managers and Rural Appraisers). Mike Belote with California Advocates was kind enough to host us at his offices in downtown Sacramento.

We discussed a number of legislative issues currently circulating, such as single-payer health care, the repeal of the Ellis Act (AB 854), the “great resignation” from the state legislature, sales tax on services, redistricting, the new bureau chief, potential mileage fees for drivers, and of course, appraisal related issues.

New real estate and appraiser education requirements:

- Senate Bill (SB) 263 requires real estate licensees and license applicants to complete implicit bias training during their licensing courses and 45-hour renewal courses. These new requirements go into effect beginning in January 2023 and will require real estate licensees and licensee applicants to learn:
 - the impact of implicit, explicit and systemic biases on consumers;
 - the historical and social impacts of those biases; and
 - actionable steps licensees can take to recognize and address their own biases.
- For real estate appraisers, Assembly Bill (AB) 948 requires cultural competency and anti-bias training. This new law also makes it unlawful for appraisers to discriminate in their appraisals or in making available their services to members of protected groups.
- Further, the Bureau of Real Estate Appraisers (BREA) will be required to include a check box within their existing complaint form, asking the complainant whether they believe the appraisal is below market value. Complainants will have the option to include their demographic information on the form. The BREA will need to study this demographic information and provide a report of their findings to the state legislature before July 1, 2024.

A summary of key housing legislation that was passed in 2021 to take effect in 2022:

- SB 10, which authorizes local governments to zone any parcel for up to 10 units of residential density when the parcel is located in a transit-rich area, a jobs-rich area or an urban infill site;
- AB 345, which requires each local agency to allow an accessory dwelling unit (ADU) to be sold or conveyed separately from the primary residence to a qualified buyer;
- AB 571, which prohibits a local government from imposing affordable housing impact fees from being imposed on a housing development’s affordable units;
- SB 591, which permits the covenants, conditions and restrictions (CC&Rs) of a senior citizen housing development to establish intergenerational housing that includes seniors aged 55+ along with caregivers who do not meet the age minimum and transitional age youths, as long as at least 80% of the occupied dwelling units in the development are occupied by seniors;

- AB 1584, which makes any CC&R that affects the transfer or sale of an interest in real estate that effectively prohibits or unreasonably restricts the construction or use of an ADU on a lot zoned for SFR use void and unenforceable. It also requires a common interest development (CID) to amend any governing document that includes a covenant restricting ADUs in this manner by July 1, 2022;

- SB 9, which sets forth what a local agency can and cannot require in approving the construction of two residential units on a single lot, or a single family residence and an ADU. This new law also requires a proposed housing development containing two residential units within a single-family residential zone to be considered without discretionary review or hearing when the proposed housing development meets certain requirements, including that the proposed housing development does not require demolition or alteration of low- or moderate-income housing; and

- SB 60, which raises the maximum fines for violating an ordinance relating to a residential short-term rental which poses a threat to health or safety from \$100 to \$1,500 for a first violation, from \$200 to \$3,000 for a second violation of the same ordinance within one year, and from \$500 to \$5,000 for each additional violation of the same ordinance within one year of the first violation.

Bureau of Real Estate Appraisers Sunset Review Process:

- As of 2/26/2022, there are 2,782 AG's, 4,966 AR's, & 940 AL's for a total of 8,688 accredited licensees. Additionally, there are 722 AT's paying fees to BREAA for a total of 9,410 paying fees to BREAA. This is down about 100 from a year ago.

- The BREAA is in a bit of a death spiral as the number of licensed appraisers declines. The bureau is currently under the Department of Consumer Affairs (DCA). However, merging it with the DRE might bring about administrative savings from economies of scale of a larger department. Mike cautions however, that the DRE would likely not be in favor of subsidizing the bureau.

- Angela G. Jemmott, 60, of Sacramento, has been appointed Bureau Chief of the California Bureau of Real Estate Appraisers. Jemmott has been Executive Director of the California Commission on Disability Access since 2015, where she served as an Associate Program Analyst from 2011 to 2015. She was a Staff Services Analyst at the Department of General Services from 2008 to 2011.

- The GRC has raised the issue of appraisal renewal fees with the Bureau. We have questioned the legality of the "renewal evaluation fee". Per Mike Belote, there is no statutory authority for such a fee.

Appraisal Bias:

Appraisal bias issues have been front and center - in the news, in the courts, in the legislature, and in the court of public opinion. A few salient points:

- AB924 sponsored by Assembly member Chris Holden, will require real estate appraisers to complete qualifying and continuing education in cultural competencies and the elimination of bias. The bill also requires that sales contracts and loan documents emphasize that any appraisal must be unbiased and not influenced by improper illegal considerations. The committee along with Mike Belote worked collectively with the Legislature in support of this bill. In so doing, we avoided what could have been a more pernicious outcome.

- We discussed at length the letter sent to Elizabeth Korver-Glenn which made its way to Representative Maxine Waters from California. Needless to say, the committee expressed its dismay at the letter coming from a designated member no less. The Appraisal Institute has responded and is working at the National level with Ms. Waters and The House Committee on Financial Services.

- While not directly related to our work in California, there is a push to make borrowers an intended user for all appraisals performed for FRT's which may be in violation of two

California Court of Appeals Cases on privity:

Willemsen: <http://www.courts.ca.gov/opinions/nonpub/G050075.PDF>

Graham: <http://caselaw.findlaw.com/ca-court-of-appeal/1667662.html>

In closing, please reach out to me or any committee member with comments or questions. The CA GRC appreciates the support of Appraisal Institute members.

The 2022 Southern Branch

Chair: Alex Jaffe, MAI
Vice Chair: Robert Contant, MAI
1st Advisor: Michael Snodgrass, MAI
2nd Advisor: Michelle Rogers, SRA
3rd Advisor: Jeff Hogan, SRA, AI-RRS

The Southern Branch represents and serves appraisers from Orange County and Long Beach.

Please join us on March 24, 2022, at the Hive & Honey Rooftop Bar within the Marriott Spectrum for our first Southern Branch Mixer event/meeting of the year. Know of anybody interested in the appraisal profession? Bring them!

At this time, we are planning for a few educational and in-person offerings so please check our chapter website to see who's on deck.

REGISTER FOR MIXER

SCCAI NEW MEMBERS

Neal Warren DeLoye - Affiliate
Ioana Maria Ciora - Candidate for Designation
Jeannine Joni Cook - Candidate for Designation
Jessica Do - Practicing Affiliate
Quinn Matthew Hazard - Practicing Affiliate
Edward Phillip De Leon - Student Affiliate
Larry Joseph Eichel - Student Affiliate
Luis Navarro - Student Affiliate
Vince Nguyen - Student Affiliate

MEET OUR NEWLY DESIGNATED MEMBERS

Chris T. Kim, MAI
Lynette Bartlomain, MAI, SRA, AI-GRS, AI-RRS

Scholarships Available

The Mason – Thornton Scholarship Committee would like to remind our Members that the Chapter offers valuable financial assistance for those pursuing their designations. Namely, the Mason – Thornton Scholarship Fund is available to SCCAI Members who have an active Candidate status and are members in good standing. Scholarships assistance is

available for up to 75% of the total course fee. In-person, synchronous, and/or online courses are eligible insofar as the course is required for professional designation. Applications, which are available on the Chapter website, should be submitted to Lianna at least 30 days prior to the class start date. There is no better time to continue and/or resume the quest for your professional designation.

Bradford Thompson, MAI, AI-GRS

Chair, Mason – Thornton Scholarship Fund

Application and Information



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