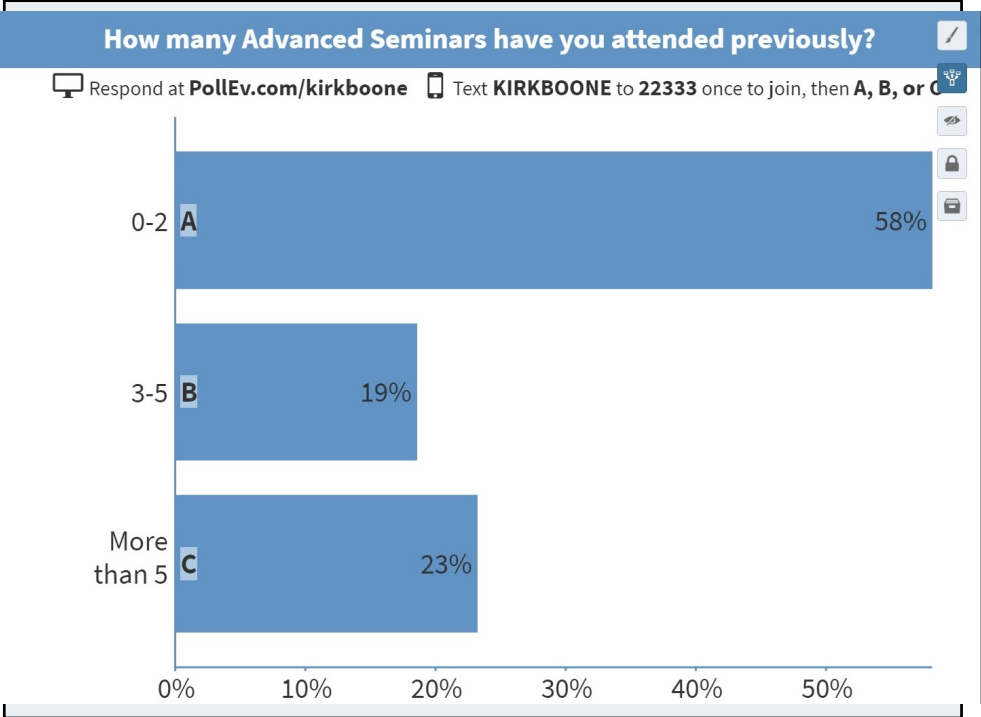


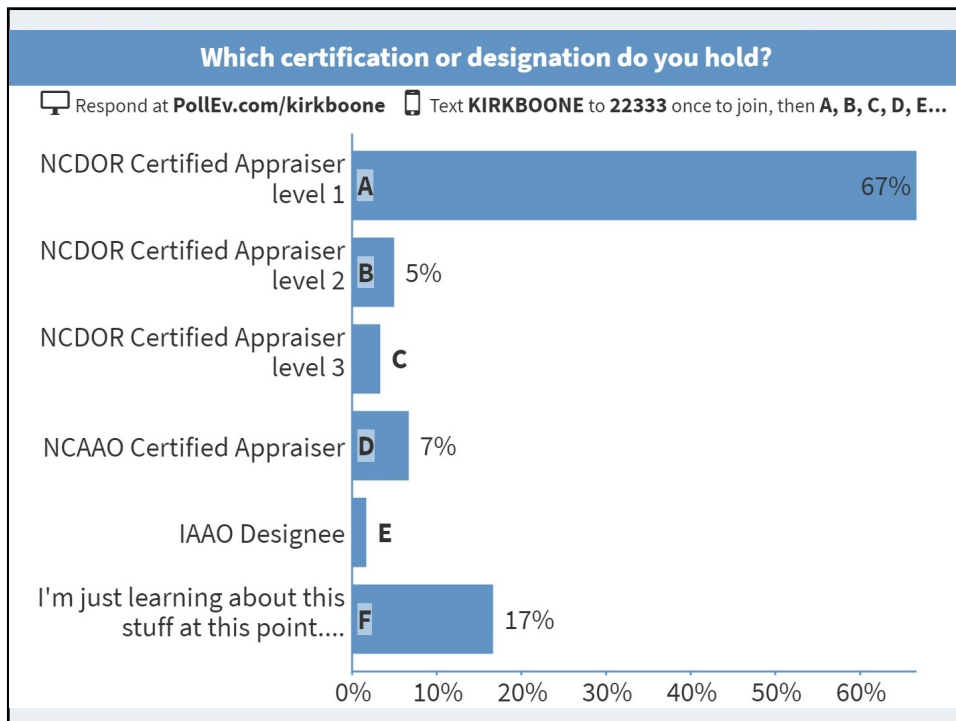
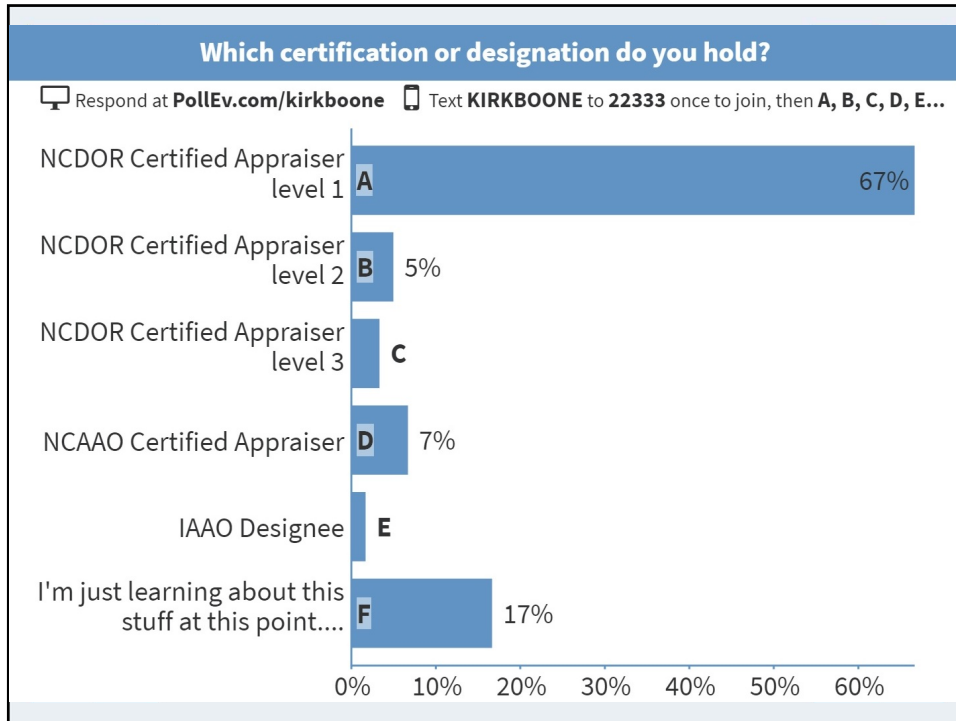
At this time  
Please go to [www.pollev.com/kirkboone](http://www.pollev.com/kirkboone)

**PROPERTY TAX EDUCATION PARTNERSHIP**

The PTEP Education Program  
2017 Advanced Seminars – Personal Property  
Greensboro, NC  
September 18, 2017

UNC SCHOOL OF GOVERNMENT | NCDOR NORTH CAROLINA DEPARTMENT OF REVENUE





## The Beginning

- 1980 NCAAO Professional Designation Program
  - NC Certified Assessor
  - Member of NCAAO
  - 5 years experience, and conducted a reappraisal
  - Listing and Assessing
  - IAAO 101
  - Personal Property (IAAO or NCDOR)
  - IAAO 400
  - IAAO 102
  - USPAP 15-Hour – 2015 addition
  - Voluntary

## The Beginning

- 1983 NCAAO Professional Designation Program
  - NC Certified Personal Property Appraiser
  - Member of NCAAO
  - 5 years in NC Assessors office, 3 years experience
  - Listing and Assessing
  - IAAO 101
  - Personal Property (IAAO or NCDOR)
  - Principles of Accounting or IAAO 500
  - USPAP 15-Hour – 2015 addition
  - Signed verification statement from supervisor
  - Voluntary

## The Beginning




- 1983 General Assembly House Bill 202
  - Certification and CE for Assessors and Appraisers
  - NCGS 105-289 NCDOR provides the program
  - NCGS 105-294 Assessors pass 4 courses and exam, 2yrs
  - NCGS 105-296 Appraisers, Listing and Assessing +
  - NCGS 105-299 Employees of appraisal firms
  - NC Administrative Code specifies courses
  - Required! NCDOR website


## PTEP

- 2015 - Created a Brand
- Collaboration between NCDOR and SOG
- Decreased cost of courses by 50%
- Increased offerings by 120%
- Offerings in regional locations
- Welcomed additional instructors
- Calendar with 18 months of scheduling

# PTEP

- The **Property Tax Education Partnership** is a collaboration between the UNC School of Government and the North Carolina Department of Revenue. This partnership offers the certification and continuing education necessary to meet legislative educational requirements for North Carolina county assessors and county appraisers. The partnership promotes public service excellence and professional development for North Carolina assessment administration, property appraisal, collection, and property tax policy.






## PROPERTY TAX EDUCATION PARTNERSHIP

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Date	Program	Location	NCDOR CE Hours*	Host
Nov	9-13 NCAAO Fall Conference	Cherokee	14**	NCAAO
	9 USRP 7-Hour Update Course	Cherokee	7	NCAAO
	9-10 Present-Use Value Seminar	Cherokee	15	NCAAO
	10 Evaluating Residential Constructors Craft, Quality, and Condition	Cherokee	7	NCAAO
Dec	3-4 IAAD 852 - AAS Case Study Review	Charlotte	0	NCDOR
	7-11 IAAD 101	Durham	30	NCDOR
Jan	25-29 IAAD 300 - Fundamentals of Mass Appraisal	Williamston	30	NCDOR
Feb	10-12 IAAD 551 - Valuation of Machinery and Equipment	Hickory	18	NCDOR
	24 Property Tax Collection Seminar	Morganton	4**	UNC SOG
Mar	2-4 IAAD 150 - Mathematics for Assessors	Triangle Area	15	NCDOR
	8-10 Fundamentals of Property Tax Collection	Chapel Hill	30	UNC SOG
Apr	4-8 IAAD 101 - Fundamentals of Real Property Appraisal	Western Carolina	30	NCDOR
	19-20 Present-Use Value Seminar	Fayetteville	15	NCDOR
	26-28 NCVTS Training Seminar	Chapel Hill	15	NCDOR
	27-29 NCTCA Spring Conference	New Bern	14**	NCTCA
May	25-26 USRP National 15-Hour Course (IAAO 151)	New Bern	15	NCTCA
Jun	16-20 IAAD 102 - Income Approach to Valuation	Jacksonville	30	NCDOR
	23-26 Property Tax Listing and Assessing	Hickory	30	UNC SOG
	13-17 IAAD 553/553 - Basic/Advanced Personal Property Auditing	Asheville	30	NCDOR

\* Collector CE hours are determined by NCTCA.  
\*\* These CE hours apply to assessors only. Other numbers apply to both assessors and appraisers.

## 2015 New Certification Level II

- IAAO Course 101 Fundamentals of Real Property Appraisal and,
- IAAO Course 102 Income Approach to Valuation and,
- USPAP National 15-Hour and,
- IAAO Course 500 Assessment of Personal Property and,
- IAAO Workshop 551 Valuation of Machinery and Equipment and,
- IAAO Workshop 552 Basic Personal Property Auditing, OR IAAO Workshop 553 Advanced Personal Property Auditing, OR IAAO Course 501 Personal Property Auditing-Basic to Advanced.
- Or hold the IAAO PPS Designation

## 2015 New Certification Level III

- All of the Level II requirements
- USPAP 7-hour update
- Complete and pass the exam in two of the courses and three of the workshops on the Approved IAAO & NCDOR Elective Classes List.
- Or hold the IAAO CAE Designation

## Developments

- Revisiting the plan
  - Costs, meeting space, enrollment
  - Annual courses will rotate
  - Infrequent courses will be central
- Online versions of USPAP
  - McKissock – TAF approved, DOR, IAAO, NCAAO

## Resources & Educational Groups

- NCDOR.gov –, local government, education
- SOG.UNC.edu
- NCAAO search at SOG site
  - Education Committee
  - Certification Committee, NCAAO designations
- NCTCA.org
- NCProperty mappers.org
- Candidates Club (NCAAO website)
- IAAO.org, HQ and state reps (Lantis, Stone, Vincent)

# The future of communication?



PROPERTY TAX EDUCATION PARTNERSHIP


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## What do you think about PollEverywhere?

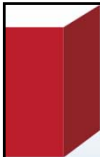
Respond at [PollEv.com/kirkboone](https://PollEv.com/kirkboone)

Text **KIRKBOONE** to **22333** once to join, then text your message



Word cloud terms: instead, group, percentages, participation, calling, keeps, because, respond, everyone, idea, nice, interesting, education, love, data, works, think, useful, fun, shows, able, need, amazing, responses, read, great, awesome, wi-fi, free, helpful, cool, tool, based, love, fantastic, good, instant, students, crazy, give, people's, feedback, handy, interactive, beneficial, teaching, provides, opportunity, pretty, question.





Kirk Boone, PPS  
UNC School of Government  
[boone@sog.unc.edu](mailto:boone@sog.unc.edu)  
919.962.7434

