



APPRAISER MENTORSHIP PROGRAM

UTAH DIVISION OF REAL ESTATE REMEDIAL EDUCATION APPRAISER MENTORSHIP PROGRAM

The Utah Division of Real Estate (Division) has formally instituted the Remedial Education Appraiser Mentorship Program. Mentors, appointed by the Division, are responsible for effectively communicating real estate appraisal practices, skills, and methodologies to enhance and improve the Mentees' knowledge and professional development as real estate appraisers. The Mentorship Program Guidelines for Utah Real Estate Appraiser Mentors and Mentees (the "Guidelines") outline the specific requirements for its implementation and operation.

What is the Utah Division of Real Estate Mentorship Program?

The appraisal profession relies heavily on the integrity and competency of its licensees. The Remedial Education Appraiser Mentorship Program is an essential component in ensuring appraiser competency. Mentors are certified residential or certified general appraisers who have 5 or more years of experience, no disciplinary action within the last 5 years, and have completed the required Mentor training class.

A complaint filed against an appraiser may result in a Final Order or a Contingent Dismissal Agreement that requires the license holder to participate in the mentoring program. Sometimes, remedial training is required for prospective applicants as part of approval for their licensure. In either instance, prospective Mentees are provided with a list of Utah Division of Real Estate Mentors and will complete the mentorship program as outlined below. The purpose of the mentorship program is not to place judgment on the appraiser, but rather to provide educational guidance that enhances the quality and clarity of their work product.

Program Goals:

The purpose of the mentorship program is to provide remedial education to assist appraisers in achieving a higher level of professional competency through:

- Enhance Appraisal Skills: Provide targeted support and guidance to licensees by fostering a deeper understanding and correct application of recognized methods and techniques, thereby ensuring the production of credible and reliable appraisals; and
- Promote Ethical Conduct: Cultivate a deep understanding of the Uniform Standards of Professional Appraisal Practice (USPAP), Utah Statutes, and Rules, and apply them to the appraisal process.
- Foster Professional Development: Encourage a culture of continuous learning and professional development, inspiring appraisers to grow with new policies, practices, and technology.

- Build a Strong Appraisal Community: Create a supportive and collaborative environment for both mentors and mentees, fostering professional relationships within the local appraisal market.

Program Overview:

The Appraisal Mentorship Program will provide licensees found in violation of appraisal standards and state regulations with experienced, qualified mentors. Mentors and Mentees will provide:

- Matching: Mentees will select a mentor compatible with their remedial educational needs.
- Collaboration: Mentees and Mentors will create a one-on-one remedial educational training program tailored to fit the specific needs and challenges of the mentee.
- Technical Assistance: Mentors will review Mentees' current appraisal practice, appraisal reports, and provide guidance on specific gaps, navigate regulations, and provide follow-up with a current appraisal.
- Professional Development: Mentors will direct Mentees to educational resources, industry best practices, and opportunities for professional growth.
- Accountability and Support: Regular check-ins, performance monitoring, and a supportive environment to encourage professional development and adherence to ethical standards.

This program is intended to provide remedial education to assist appraisers in gaining valuable first-hand knowledge to improve quality, clarity, and professional competency. It is in no way a personal judgment of the appraiser.

Mentor Responsibilities:

- Review the relevant data, develop, and submit a plan to address the identified deficiencies before the first mentoring session.
 - Final Order or Contingent Dismissal Agreement
 - investigator's report
 - sample Mentee's work product, and/or workfiles,
- Communicate effectively with the Mentee
- Record all videoconferencing sessions and provide a recording to the Mentee. This recording will also be submitted to the state to become part of the Mentee's file.
- Control the mentoring process to ensure educational goals are met; and
- Confirm competency and appropriate license type for the topics the mentee is seeking mentorship on.
- Submit an outline of the individual lessons to the Division of Real Estate as an ongoing component to monitoring the Mentee's progress. Please note that lesson outlines may be submitted after the fact, as they can be subject to change.
- Submit to the Board, upon completion of the mentorship, a summary of topics discussed and general feedback relating to the mentorship program. Please do not submit completion of the mentorship program before all compensation has been completed by the Mentee.

- The Mentor will maintain strict confidentiality regarding the mentorship, including all, but not limited to: meetings, the minutes of those meetings, the results of those meetings, the paperwork from the meetings, etc.

It is not the role of the Mentor to question the investigative results. The Mentor may find issues with the appraisal and/or the appraisal report outside of the investigation findings. If this is the case, the Mentor is not obligated to the state to point out these extra errors.

Mentee Responsibilities:

The Mentee's role is to work to improve their competency in identified areas. The mentoring session(s) require active participation of the Mentee.

The Mentee must be willing to work one-on-one with the Mentor, providing the remedial training/education, and is expected to:

- Take responsibility for the accountability and completion of the program.
- Select an appropriate Mentor who matches the remedial need(s). Selection of the Mentor must be completed within 30 days of the Final Order or Contingent Dismissal Agreement.
- Create a schedule with the Mentor and show investment in the program by being punctual and involved in the process.
- Ensure timely Mentorship compensation/payment to the Mentor based on the Mentor-disclosed fee schedule submitted to the Division.
- Communicate effectively with the Mentor by engaging in open and frank discussions of the Mentee's process and work product.
- Actively participate in each session.
- Recognize that homework may be required, which would take place outside the mentorship hours.
- Review appraisal procedures, personal appraisal report(s), and/or workfile(s) with the Mentor.
- Demonstrate recognized appraisal methodology and/or techniques as required to improve the Mentee's appraisal practice.
- Refer to additional resources beyond the mentoring session(s).
- Submit to the Board, upon completion of the mentorship, a summary of topics discussed and general feedback relating to the mentorship program.
- Diligently demonstrate improved measures to ensure similar violations do not occur in future appraisals.
- The Mentor will maintain strict confidentiality regarding the mentorship, including all, but not limited to: meetings, the minutes of those meetings, the results of those meetings, the paperwork from the meetings, etc.

Administration of the Mentorship Process

Neither the Mentors nor the Mentees are employees, agents, or contractors of the Utah Division of Real Estate. The Division makes no representations, warranties, or guarantees regarding the mentorship or remedial educational sessions and expressly disclaims any liability arising from the mentorship or tutorial process. It is the sole responsibility of the Mentor and

Mentee to determine the appropriateness of the mentoring session(s) to correct appraisal practice deficiencies.

The Mentor and Mentee are responsible for completing and submitting their respective documentation within the required timeframes.

The Mentoring Process:

The Mentee will be provided a mentorship packet that includes a list of Mentors approved by the Utah Division of Real Estate, mentorship guidelines, and a certification of completion form.

The Mentee will select and contact the Mentor, and together, establish agreed-upon terms of the mentorship process, including dates, locational training, fees, and any other applicable terms within 30 days of the issuance of the Final Order or Contingent Dismissal Agreement.

- At the inception of the mentoring session, the Mentor and Mentee will review the terms of the mentoring session and sign any agreement(s) required by these guidelines.
- The Mentor will be provided with the appropriate documentation: Final Order or Contingent Dismissal Agreement, investigative report, complaint and response, workfile, etc.
- Mentees are responsible for compensating the Mentor based on the Mentor-disclosed fee schedule submitted to the Division.

Mentorship sessions must be conducted in a safe public location or by using a video-conferencing application. The Mentor will be responsible for recording all videoconferencing sessions and providing a recording to the Mentee. This recording will also be submitted to the state to become part of the Mentee's file.

The environment should be conducive to the education process and provide sufficient privacy to allow frank and candid discussion of relevant issues.

Either participant may terminate the mentoring session at any time and for any reason. Termination does not relieve the Mentee of the mentorship obligation. It is the sole responsibility of the Mentee to find a replacement Mentor and establish terms.

To preserve the educational nature and integrity of the Mentorship program, the Mentor and Mentee shall maintain strict confidentiality regarding their meetings and all documentation resulting from those meetings.

It is the Mentee's sole responsibility to finalize the agreed-upon payment of the Mentorship services and ensure the delivery of the signed certification documenting the successful completion of the mentoring process to the Utah Division of Real Estate. The certification, documenting successful completion of the mentoring process, must be signed by the Mentor only after mentorship fees have been finalized and delivered within seven (7) days of completion or, if specified, delivered according to the terms of the Final Order or Contingent Dismissal Agreement.

At the discretion of the Division, the Mentor may be required to provide further documentation and or additional work samples as to the topics covered and the outcome of any mentoring session.

Mentorship Qualifications:

Mentors are appointed by the Utah Division of Real Estate and must be able to effectively communicate real estate appraisal practices, skills, and methods with the appraiser to improve the individual's skills as a real estate appraiser. Mentors must meet the following criteria:

- Experience: 5+ years as a certified residential or certified general appraiser.
- Licensing: In good standing with all states, the Mentor holds an appraiser license/certification, and with no disciplinary action within 5 years.
- Review: Demonstrate sufficient appraisal competency and knowledge by submitting a resume, letter of recommendation, appraisal report(s), and workfiles to the Division of Real Estate for review
- Professional Standing: Demonstrate commitment to ethical conduct and professional development within the appraisal industry. Ensure no conflicts of interest.
- Willing/Able: Perform at least 32 hours in a year of in-person or video conference mentorship sessions.
- Training: Participate in Division-required mentorship training.

How to Apply to Become a Utah Division of Real Estate Mentor

1. Complete the Mentor application.
 - a. Disclose any disciplinary history.
 - b. List appraisal resources and tools utilized in appraisal practice
2. Write a cover letter on professional letterhead addressed to the Board.
 - a. The letter should identify you and provide your rationale for requesting to become an Appraiser Mentor.
3. Provide a resume including a letter of recommendation.
4. Provide 3 sample appraisal reports and workfiles.
5. Send all of the above information via email to Bryn Kaelin bkaelin@utah.gov.

Upon approval of the Utah Division of Real Estate, complete the required Mentor training and conduct mentoring sessions according to the Utah Division of Real Estate guidelines.

Once you have been approved as a Mentor, you will be added to the Approved Mentor List.