

STATE OF CONNECTICUT

Board of Examiners of Environmental Professionals

Board Members:
Denise Ruzicka, PE, Chairman
John Adams, LEP
Michelle Gamache
Robert F. Good, Jr., LEP
Stephen Holtman PE, LEP
Jeffrey Loureiro, PE, LEP
Kelly Meloy, LEP
Elsie Patton
Alisa Phillips-Griggs
Carol Violette, PhD, CHMM

MINUTES

State Board of Examiners of Environmental Professionals

Regular Meeting – December 13, 2018

A. Call to Order and Sign-In

A regular meeting of the State Board of Examiners of Environmental Professionals (“the Board”) was called to order on Thursday, December 13, 2018 at 10:32 AM in the Russell Room on the 3rd floor, 79 Elm Street, Hartford, by Chair Ruzicka. Board members J. Adams, A. Phillips-Griggs, R. Good and M. Gamache, Stephen Holtman and Board Administrator K. Maiorano were present. Mike Cote representing EPOC, Jacques Gilbert and Ken Collette from DEEP and D. Wrinn representing the Attorney General’s Office attended the meeting.

B. Reading and Approval of the Minutes

The reading and approval of the November 2018 Board meeting minutes was tabled to the January 2019 meeting.

C. Public Participation

Mr. Cote had no comments.

D. Unfinished Business and General Orders

Update on complaint #17-102

K. Maiorano reported that J. Loureiro and E. Patton had decided to proceed and were in the process of drafting a detailed letter to be sent to the LEP.

Update on complaints #18-101 and #18-102

R. Good reported that C. Violette and he had completed the initial review and were planning to meet to discuss next steps.

Update on complaint #18-103

M. Gamache and J. Adams reported that they had begun their review of documents prior to the Board meeting.

Update on YEP talk

Chair Ruzicka reported that Board Administrator K. Maiorano and Board member J. Adams participated in the event. The YEP group was very receptive to the presentation. A copy of the presentation was distributed to the Board.

Appraisal Institute use of Designations, Emblems and Logo

M. Gamache distributed the Appraisal Institute Regulation No. 5, *Use of Appraisal Institute Logo, Membership Designation and Emblems*. Chair Ruzicka pointed to a specific section of Page 4, starting on Line 68 as pertaining to what the firm and individual can and cannot do.

Membership designations and/or references to designation in the Appraisal Institute shall not be used or displayed in connection with the name, logo or signature of any firm in any manner that might be interpreted as referring to any entity other than the Designated Member or in any manner which would imply that a Candidate for Designation, Practicing Affiliate, Affiliate or individual other than a Designated Member holds an Appraisal Institute designation.

M. Gamache then highlighted sections in the Business Practice and Ethics document that pointed to the value of the designation and why misrepresentation devalues the brand.

Chair Ruzicka suggested that the Board consider regulatory revisions that would specify the use of the designation and protect the brand of LEP. This also is protective of the public by specifying the use of the designation so that the public is not misled.

S. Holtman suggested that guidance be developed to the adoption of regulations.

Annotated sections of the Appraisal Institute materials are attached for future consideration.

E. New Business

Course Approvals

Course approval request from LSPA for course titled “**Per- and Polyfluoroalkyl Substances (PFAS): The Latest Information**” for 4 CECs. On a motion by S. Holtman, seconded by J. Adams, the course was approved unanimously for 4.0 credits.

Course approval request from HalfMoon Education Inc. for course titled “**Connecticut Wetlands Law and Compliance**” for 7.5 CECs. On a motion by R. Good, seconded by A. Phillips-Griggs, the course was denied approval unanimously.

Motion to add consideration of Criteria for Referrals of LEPs to the Board for Review/Investigation by M. Gamache, seconded by A. Phillips-Griggs, passed unanimously.

The criteria, as revised by DEEP staff was distributed to the Board. Chair Ruzicka suggested that Rob Robinson attend the January Board Meeting to discuss the revisions to the criteria. Further discussion will occur during the January Board meeting.

Letter from Commissioner

A letter was provided to the Board from Commissioner Klee thanking Chair Ruzicka for her twelve years of dedicated service as Board Chair. The Commissioner has appointed Kenneth M. Collette as his designee on the Board effective January 2, 2019.

Chair Ruzicka commented on her twelve years of service and her enjoyment as Chairperson. Mr. Collette provided a summary of his background and that he is looking forward to the challenges and rewards of serving in this capacity.

The Board unanimously commended Chair Ruzicka on her time with the Board and their regrets that she will be leaving the Board.

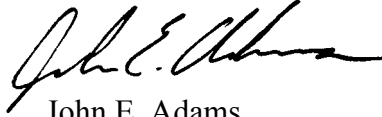
Next meeting is January 10, 2019 at 9:30AM.

F. Adjournment

Chair Ruzicka declared the meeting adjourned at 11:40AM.

Minutes were approved on January 10, 2019.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "John E. Adams". The signature is fluid and cursive, with a long horizontal stroke at the end.

John E. Adams
Board Secretary



Regulation No. 5

Use of Appraisal Institute Logo, Membership Designations and Emblems

Effective January 1, 2013

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REGULATION NO. 5

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1 **ARTICLE I**

2

3 **Use of Appraisal Institute Logo**

4

5 **Part A: General**

6 The Appraisal Institute logo shall only be used by the Appraisal Institute, its regions, its chapters and
7 its Designated Members under the conditions specified in the Bylaws, Regulations and policies of the
8 Appraisal Institute, and by organizations holding a specific license for such use.

9

10 The Appraisal Institute may use the logo on communications, Websites, educational materials,
11 publications, forms, software, premium items and other material in accordance with the Bylaws,
12 Regulations and policies of the Appraisal Institute.

13

14 Regions and chapters may use the logo on communications, Websites and other specifically
15 permitted material in accordance with the Bylaws, Regulations and policies of the Appraisal Institute.

16

17 Designated Members may use the logo on their firm's letterhead, or Websites, the Designated
18 Member's business cards and other specifically permitted material in accordance with the Bylaws,
19 Regulations and policies of the Appraisal Institute, provided that all individuals in the Designated
20 Member's firm (sole proprietorship, partnership, corporation, or similar business entity) who provide
21 Service(s) as defined by the Appraisal Institute Code of Professional Ethics are Designated Members,
22 Candidates for Designation or Practicing Affiliates of the Appraisal Institute and provided that the logo
23 is used in conjunction with any explanatory statement required by the Appraisal Institute. Designated
24 Members may not use or display the logo in any manner that might suggest that the firm is affiliated
25 with the Appraisal Institute.

26

27

28 **Part B: Requirements and Restrictions**

29 The Board of Directors shall determine the official colors of the Appraisal Institute logo. Printed copies
30 of the logo must be exact reproductions and shall not contain, be surrounded by or be a part of any
31 extraneous decoration or embellishment and shall be in the official colors or black and white unless in
32 the opinion of the Appraisal Institute it is economically or aesthetically undesirable to do so.

33

34 Reproductions of the Appraisal Institute logo shall be only from electronic artwork from the Appraisal
35 Institute.

36

37 The Appraisal Institute logo shall only be used with the registration mark "R" immediately below and
38 to the right of the logo to signify its registration in the United States and in other jurisdictions.

39

40 The use of the Appraisal Institute logo in advertisements shall be in accordance with the Bylaws,
41 Regulations and policies of the Appraisal Institute and shall conform to the same standards of dignity
42 and professionalism as are required in connection with other permitted uses.

43

87 Use of Appraisal Institute Designation Emblems

89 Part A: General

90 Appraisal Institute designation emblems (i.e., pictorial representations of the designations) shall be
91 used only by the Appraisal Institute, its regions, chapters and Designated Members and by entities
92 holding specific license for such use and only in a dignified manner in accordance with the Bylaws,
93 Regulations and policies of the Appraisal Institute.

96 Part B: Requirements and Restrictions

97 Designation emblems shall not be used or displayed in connection with the name, logo or signature of
98 any firm, sole proprietorships, partnerships, corporations or similar business entity partnerships, or in
99 any manner that might be interpreted as referring to any entity other than the Designated Member
100 and shall not be used in any manner which would imply that a Candidate for Designation, Practicing
101 Affiliate, Affiliate or individual other than a Designated Member holds an Appraisal Institute
102 designation.

104 An Appraisal Institute designation emblem may be used on a Designated Member's correspondence,
105 business cards, Websites, appraisal report covers and seals.

107 An Appraisal Institute designation emblem may appear only once on each piece of correspondence,
108 web page, appraisal report cover, business card or advertising material used by a Designated
109 Member.

111 Reproduction of an Appraisal Institute designation emblem shall be only from electronic artwork
112 obtained from the Appraisal Institute.

114 A Designation emblem shall be reproduced only in the official colors of the Appraisal Institute as
115 determined from time to time by the Board of Directors. A printed designation emblem must be an
116 exact reproduction and shall not contain, be surrounded by or be part of any extraneous decoration or
117 embellishment and shall be in the official colors or black and white unless in the opinion of the
118 Appraisal Institute it is economically or aesthetically undesirable to do so.

120 A designation emblem shall be used only with the registration mark "R" immediately below and to the
121 right of the emblem to signify its registration in the United States and in other jurisdictions.

123 The use of an Appraisal Institute designation emblem in an advertisement shall be in accordance with
124 the Bylaws, Regulations and policies of the Appraisal Institute and shall conform to the same
125 standards of dignity and professionalism as required in connection with other permitted uses.

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ARTICLE IV

128

129

Effect of Termination or Suspension of Designated Membership and Suspension or Revocation of Charter

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If a Designated Member is terminated or suspended for any reason, such individual shall immediately cease any use or display of the Appraisal Institute logo, Appraisal Institute designation emblems and Appraisal Institute membership designations.

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Upon the suspension or revocation of the charter of any chapter, such chapter shall immediately cease any use or display of the Appraisal Institute logo, Appraisal Institute designation emblems and Appraisal Institute membership designations.

12/03/12

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46 Use of Appraisal Institute Membership 47 Designations

48

49 Part A: General

50 Appraisal Institute membership designations are conferred only upon individuals and not on firms,
51 sole proprietorships, partnerships, corporations or similar business entity partnerships. Appraisal
52 Institute membership designations shall be used only by Designated Members in a dignified manner
53 in accordance with the Bylaws, Regulations and policies of the Appraisal Institute.

54

55

56 Part B: Requirements and Restrictions

57 Except as otherwise provided in the Bylaws, Regulations and policies of the Appraisal Institute,
58 Appraisal Institute membership designations may only be used in connection with a Designated
59 Member's name. Designated Members may identify themselves by the membership designation(s)
60 they hold.

61

62 Appraisal Institute membership designations may be used on Designated Members' correspondence,
63 business cards, Websites, reports and seals. The membership designations must appear in capital
64 letters and shall not be in type or lettering larger than that of the Designated Member's name. The
65 letters in each membership designation shall be used without a period or space after each letter.

66 Appraisal Institute membership designations shall not be hyphenated.

67

68 Membership designations and/or references to designation in the Appraisal Institute shall not be used
69 or displayed in connection with the name, logo or signature of any firm in any manner that might be
70 interpreted as referring to any entity other than the Designated Member or in any manner which
71 would imply that a Candidate for Designation, Practicing Affiliate, Affiliate or individual other than a
72 Designated Member holds an Appraisal Institute designation.

73

74 Provided that a firm has at least one owner, partner or employee who is a Designated Member of the
75 Appraisal Institute and who provides Service(s) defined by the Appraisal Institute Code of
76 Professional Ethics for that firm, such firm may include in its promotional materials a statement similar
77 in content to the following:

78

79 (Name of firm) has as owners, partners or employees (number) individuals who hold the
80 (designation) designation of the Appraisal Institute, (number) individuals who hold the
81 (designation) designation of the Appraisal Institute and (number) individuals who hold the
82 (designation) designation of the Appraisal Institute (as appropriate). Some individuals may
83 hold more than one Appraisal Institute designation.

84

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Appraisal Institute

Use of Designations, Emblems and Logo

The Appraisal Institute encourages its professionals to communicate their achievement in and their commitment to the appraisal profession to their clients, peers and the public. To this end, the Appraisal Institute has created trademarked logos, designations and designation emblems.

The Appraisal Institute has also developed specific usage standards for these marks and for any reference to the Appraisal Institute and/or membership, candidacy and affiliation:

- [Appraisal Institute Regulation No. 5](#) - governs use of designations, logos and emblems
- [Trademark Usage Manual](#) - proper trademark usage with examples
- [Use of Appraisal Institute Designations, Designation Emblems and Corporate Signature](#) - information on proper references to membership, candidacy and affiliation with examples

Designations

- The membership designations may be used only in conjunction with the name of the individual Member on whom the membership designations have been conferred.
- The membership designations must appear in capital letters and in the same type style and size in which the Member's name appears.
- The letters in each membership designation must be used without a period or space after each letter.
- If a Designated member holds multiple membership designations, the designations must be separated by a comma, not a hyphen.

Provided that at least one owner, partner, or employee who is a Designated member of the Appraisal Institute and who performs services identified by USPAP for the firm, such firm may include in its promotional materials a statement similar in content to the following:

- "(Name of firm) has as owners, partners or employees (number) individuals who hold the Appraisal Institute's (fill in) designation, and (number) individuals who hold the Appraisal Institute's (fill in) designation. Some individuals may hold more than one Appraisal Institute designation."

Designation Emblems

- Only a Designated member who holds a specific designation may use the associated emblem.
- The trademark mark® must always appear with the designation emblems.
- The designation emblems may not be displayed in conjunction with a firm or in any manner that might be interpreted as referring to any entity other than the individual member.
- The emblems may not be used adjacent to a list of names that includes both Members and Candidates, Practicing Affiliates and non-members.
- The emblems may appear only once on Designated member's stationery, correspondence, report covers, business cards or marketing materials.
- Designation emblems may not be used in any three-dimensional applications or on gifts, premiums, apparel awards or decals without the written permission of the Appraisal Institute.

Emblems must be exact reproductions of the originals using the official emblem artwork available in electronic format from the [My AI section of this Web site](#). The emblems must be reproduced in the official colors of Appraisal Institute Red (PMS 1945 on coated paper or PMS 193 on uncoated paper), black or reversed to white, or silver foil stamp unless written authorization is obtained from the Appraisal Institute national office.

Professional Practice FAQs

How do I submit a report that may have Standards or Ethics violations?

Can I be notified of the results of a referral to your department?

I am having trouble accessing the Hot Topics - who can I contact?

I have a professional practice question that is not addressed in this section - who can I contact?

[View All](#)

Candidates, Practicing Affiliates and Affiliates

- The terms "Candidate for Designation", "Practicing Affiliate", and "Affiliate" may only be used in conjunction with the name of an individual who holds such status
- The terms may not be used in connection with the name, logo or signature of any firm, partnership or corporation.
- The terms may not be abbreviated, referred to as designations, nor included under a heading concerning professional designations or memberships.
- The terms can be used on business cards, letterhead and other publications.

Appraisal Institute Logo (Corporate Signature)

The Appraisal Institute logo, also known as the Appraisal Institute corporate signature, may only be used by the Appraisal Institute, its regions and chapters, or pursuant to a specific license for such use.

Designated members may use the Appraisal Institute logo provided that each of the following five conditions is met:

1. All individuals in the Designated member's firm who perform services identified by the Appraisal Institute Standards of Professional Practice are Members, Candidates, or Practicing Affiliates in the Appraisal Institute;
2. The logo is not used in a manner that might suggest that the firm is affiliated with the Appraisal Institute;
3. The logo is used only on letterhead, business cards, Web sites or other material specifically permitted by the Appraisal Institute;
4. The trademark mark® must always appear with the Appraisal institute Logo; and
5. The following statement that is most appropriate for the Designated member's business is included in close proximity to the logo to explain the presence of the logo:
 - All of the appraisers in "Smith & Company" are Designated members, Candidates, or Practicing Affiliates in the Appraisal Institute.
 - "Smith & Company" requires that all of its appraisers be Designated members, Candidates, or Practicing Affiliates in the Appraisal Institute.

Questions on the use of or reference to designations, emblems, logos and/or membership should be directed to the Professional Practice Department. Additionally, improper references to membership in the Appraisal Institute or to the Appraisal Institute designations, emblems, logos may constitute violations of the Appraisal Institute trademark rights. Possible violations should be forwarded to the Professional Practice Department.

Contact us at professionalpractice@appraisalinstitute.org.

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Business Practices and Ethics

PC420GRDMCHT

ABOUT THE APPRAISAL INSTITUTE

The Appraisal Institute is a global professional association of real estate appraisers, with more than 18,000 professionals in nearly 50 countries throughout the world. Its mission is to advance professionalism and ethics, global standards, methodologies, and practices through the professional development of property economics worldwide. Organized in 1932, the Appraisal Institute advocates equal opportunity and nondiscrimination in the appraisal profession and conducts its activities in accordance with applicable federal, state, and local laws. Individuals of the Appraisal Institute benefit from an array of education and advocacy programs, and may hold the prestigious MAI, SRPA, SRA, AI-GRS, and AI-RRS designations. *Learn more at www.appraisalinstitute.org.*



**General &
Residential
APPRAISERS**

Part 2.

Use of Appraisal Institute Logo, Membership Designations, and Emblems: Regulation No. 5

I. Overview

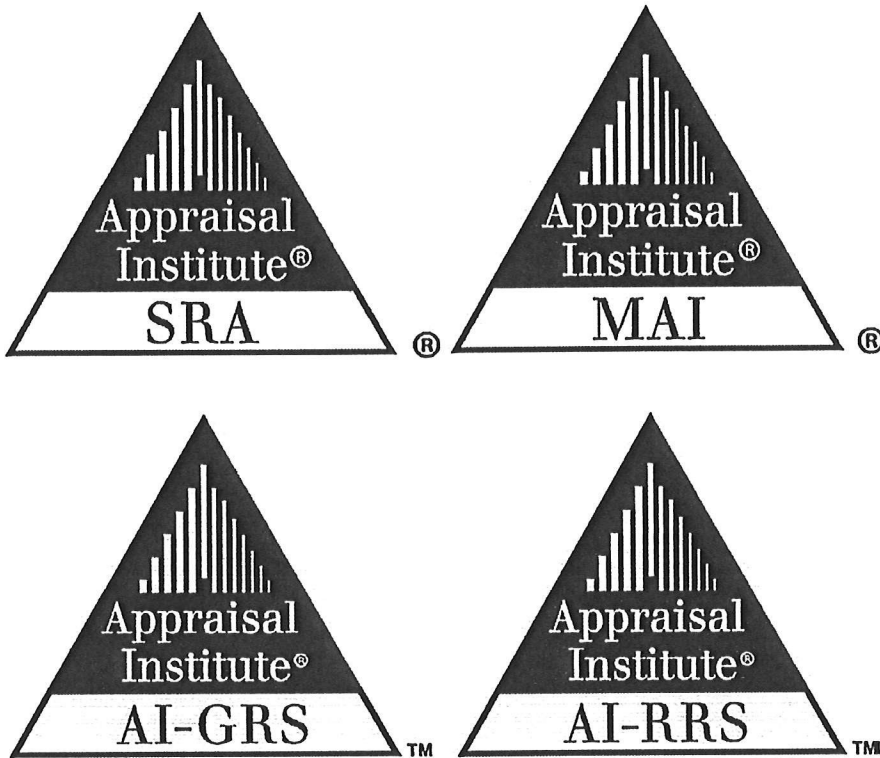
The Appraisal Institute designations, emblems, and logo are valuable symbols of the organization. Regulation No. 5 contains requirements for their correct use. In addition, Regulation Nos. 1 and 2 contain requirements that Candidates for Designation must follow in regard to statements about their candidacy, and the Bylaws contain requirements that Practicing Affiliates must follow in regard to statements about their affiliation.³

A. Appraisal Institute designations

1. MAI, SRA, SRPA, SREA, RM, AI-GRS, and AI-RRS
 - a. Between 1991 and 2013, only the MAI and SRA designations were awarded.
 - b. Starting in 2014, the AI-GRS and AI-RRS have been awarded in addition to the MAI and SRA.
2. Conferred upon those who have met specific requirements, demonstrating they have achieved high levels of education and experience.

3. To view the Bylaws and Regulations, go to www.appraisalinstitute.org. Click on "AI Resources." Then click on "Regulations & Bylaws" on the lower left side.

B. Appraisal Institute emblems are pictorial representations of the designations. Each designation has an emblem. Following are examples of the SRA, MAI, AI-GRS, and AI-RRS emblems.



C. The Appraisal Institute logo is a pictorial symbol of the organization itself.



D. Protection

1. Registered trademarks are filed with the United States Patent and Trademark Office so that their use is protected. Protection of their use is of critical importance to the organization and its Designated members, Candidates for Designation, Practicing Affiliates, and Affiliates.
2. The designations have earned a high level of recognition both within the industry and among the public at large, making the designations valuable.
3. Misuse or abuse of the designations is potentially detrimental to the Designated members who hold them, to those Candidates for Designation In the process of achieving them, and to the organization as a whole.

-
4. The same is true in regard to the emblems that are pictorial representations of the designations and in regard to the logo that is the organization's symbol.
 5. Violations of Regulation No. 5 constitute a violation of Canon 5 (E.R. 5-2) of the Code of Professional Ethics.

II. Affiliates

- A. Affiliates may **NOT** use Appraisal Institute designations, emblems, or the logo in any way.
 1. See Regulation No. 5, Article I, Part A; Article II, Part A; and Article III, Part A.
 - ✖ 2. Only Designated members may use the designations, emblems, and logo.
- B. Correct way to state that you are an Affiliate
 1. Affiliates are permitted to indicate both orally and in writing that they are Affiliates. However, there are strict requirements.
 2. Requirements are set forth in the Bylaws and Regulation No. 5, which address the use of the Appraisal Institute logo, membership designations, and emblems.
 3. An Affiliate may only refer to himself or herself, and may only be referred to, both orally and in writing, as Affiliate, Appraisal Institute.
 4. An Affiliate may **NOT** indicate that he or she is pursuing Appraisal Institute designated membership, as the Affiliate status is designed for individuals who do not provide any services as defined by the Code of Professional Ethics.
 5. Requirements for using the term *Affiliate, Appraisal Institute*
 - a. It is unacceptable to
 - Abbreviate the term *Affiliate* in any way
 - Use the term alone. The term may only be used in conjunction with the name of the individual.
 - Use the term in connection with the name, logo, or signature of a firm, partnership, or corporation
 - Use the term under a heading concerning professional designations or memberships
 - Use the terms *Member* or *membership* to describe status with the Appraisal Institute

b. It is acceptable to

- Use the term on business cards, letterhead, and other publications
- Use the term under a heading concerning professional affiliations

C. Examples for use on business cards, letterhead, Web sites, statements of qualifications, resumes, promotional material, and other written communication

Correct usage—Affiliates

- John Doe, Affiliate, Appraisal Institute
- Jane Doe is an Affiliate of the Appraisal Institute.

Incorrect usage—Affiliates

- Jean Doe, Affiliate Member of the Appraisal institute
- John Doe and Associates, Affiliate of the Appraisal Institute

III. Practicing Affiliates

A. Practicing Affiliates may **NOT** use Appraisal Institute designations, emblems, or the logo in any way.

1. See Regulation No. 5, Article I, Part A; Article II, Part A; and Article III, Part A.

~~2. Only Designated members may use the designations, emblems, and logo.~~

B. Correct way to state that you are a Practicing Affiliate

1. Practicing Affiliates are permitted to indicate both orally and in writing that they are Practicing Affiliates. However, there are strict requirements.

2. Requirements are set forth in the Bylaws and Regulation No. 5, which address the use of the Appraisal Institute logo, membership designations, and emblems.

3. A Practicing Affiliate may only refer to himself or herself and may only be referred to, both orally and in writing, as Practicing Affiliate, Appraisal Institute

4. A Practicing Affiliate may **NOT** indicate that he or she is pursuing Appraisal Institute designated membership, as the Practicing Affiliate status is designed for individuals who are not Candidates for Designation.

5. Below are requirements for using the term *Practicing Affiliate, Appraisal Institute*

a. It is unacceptable to

- Abbreviate the term *Practicing Affiliate*
- Use the term alone. The term may only be used in conjunction with the name of the individual.
- Use the term in connection with the name, logo, or signature of a firm, partnership, or corporation
- Use the term under a heading concerning professional designations or memberships
- Use the terms *Member* or *membership* to describe status with the Appraisal Institute

b. It is acceptable to

- Use the term on business cards, letterhead, and other publications
- Use the term under a heading concerning professional affiliations

C. Examples for use on business cards, letterhead, Web sites, statements of qualifications, resumes, promotional material, appraisal reports, and other written communication

Correct usage—Practicing Affiliates

- John Doe, Practicing Affiliate, Appraisal Institute
- Jane Doe is a Practicing Affiliate of the Appraisal Institute.

Incorrect Usage—Practicing Affiliates

- Jean Doe, Practicing Affiliate Member of the Appraisal Institute
- John Doe, P.A., Appraisal Institute

IV. Candidates for Designation

A. Candidates for Designation may **NOT** use Appraisal Institute designations, emblems, or logo in any way.

1. See Regulation No. 5, Article I, Part A; Article II, Part A; and Article III, Part A.



2. Only Designated members may use the designations, emblems, and logo.

B. Correct way to state that you are a Candidate for Designation

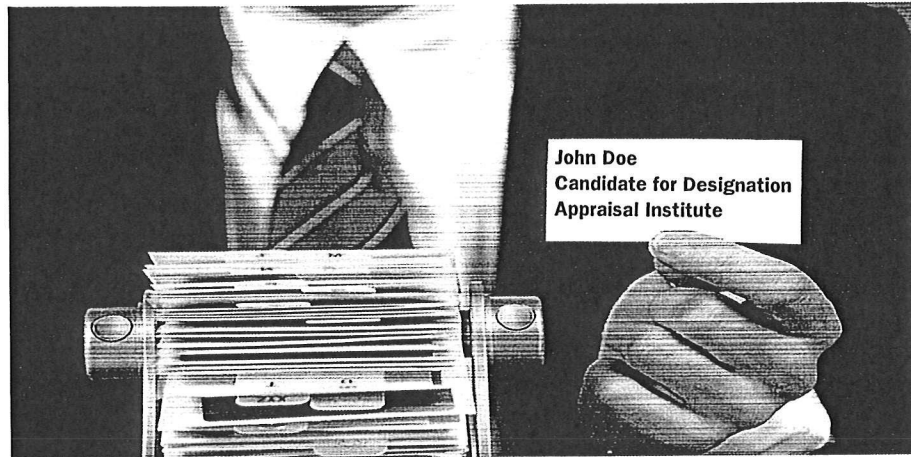
1. Candidates for Designation are permitted to indicate both orally and in writing that they are Candidates for Designation in the Appraisal Institute. However, there are strict requirements.
2. Requirements are set forth in Regulation No. 1, Regulation No. 2, and Regulation No. 3, which address general, residential, and appraisal review Candidacy, respectively.
 - a. For general Candidates for Designation, see Regulation No. 1, Article II, Part B, Section 2.
 - b. For residential Candidates for Designation, see Regulation No. 2, Article II, Part B, Section 2.
 - c. For appraisal review Candidates for Designation, see Regulation No. 3, Article II, Part B, Section 2.
3. A Candidate for Designation may only refer to himself or herself and may only be referred to, both orally and in writing, as Candidate for Designation, Appraisal Institute.
4. Below are requirements for using the term *Candidate for Designation, Appraisal Institute*.
 - a. It is unacceptable to
 - Abbreviate the term *Candidate for Designation*
 - Use the term alone. The term may only be used in conjunction with the name of the individual.
 - Use the term in connection with the name, logo, or signature of a firm, partnership, or corporation
 - Use the term under a heading concerning professional designations or memberships
 - Use the term *Member, Appraisal Institute* if the individual does not already hold another Appraisal Institute designation
 - Use the terminology *Candidate Member, Appraisal Institute*

b. It is acceptable to

- Use the term on business cards, letterhead, and other publications
- Use the term under a heading concerning professional associations
- Use uppercase *C* and *D*

C. Examples for use on business cards, letterhead, Web sites, statements of qualifications, resumes, promotional material, valuation reports, and other written communication

Example—Candidate for Designation Usage



Correct usage—Candidate for Designation

- John Doe, Candidate for Designation, Appraisal Institute
- John Doe is a Candidate for Designation in the Appraisal Institute.

Incorrect usage—Candidate for Designation

- Jean Doe, MAI Candidate, Appraisal Institute
- John Doe, Candidate Member, Appraisal Institute
- John Doe, C.D., Appraisal Institute
- Jane Doe, Candidate for Appraisal Institute Review Designation

V. Designated Members

MAI, SRA, AI-GRS, AI-RRS.

A. Use of designations

1. Privilege is bestowed on the Designated members who meet the requirements to hold them.
2. Designations are held by individuals, not firms.
3. The designations must be used only by designated individuals in a dignified manner according to the requirements set forth.
4. Strict requirements regulating use are found in Regulation No. 5, Article II, and the Trademark Usage Manual for Appraisal Institute. (A copy of the Trademark Usage Manual is in the Appendix.)
5. The MAI and SRA designations are **NOT** acronyms. The AI-GRS and the AI-RRS are acronyms.
 - a. MAI is **NOT** an acronym for "Member Appraisal Institute" or anything else. The MAI membership designation is held by appraisers who are experienced in the valuation and evaluation of commercial, industrial, residential, and other types of properties, and who advise clients on real estate investment decisions.
 - b. SRA is **NOT** an acronym for "Senior Residential Appraiser" or anything else. The SRA membership designation is held by real estate solution providers who are experienced in the analysis and valuation of residential real property.
 - c. The AI-GRS designation is an acronym for Appraisal Institute – General Review Specialist, and the AI-RRS designation is an acronym for Appraisal Institute – Residential Review Specialist.

B. Examples for use on business cards, letterhead, Web sites, statements of qualifications, resumes, promotional material, appraisal reports, and other written communication

Correct usage—Designated members.

- May identify themselves by their respective designation(s)—MAI, SRPA, SREA, SRA, RM, AI-GRS, and AI-RRS
- May use designation(s) on business cards, letterhead, Web sites, valuation reports, seals, and professional forms
- Must use ALL CAPS for designations
- Must use the designation only in connection with the name of the individual who holds it

Incorrect usage—Designated members must **NOT**

- Use periods or spaces between the letters of any designation
- Use hyphens between the letters of any designation with the exception that the general review designation must be hyphenated as follows: AI-GRS, and the residential review designation must be hyphenated as follows: AI-RRS
- Indicate that the MAI, SRA, SREA, SRPA, or RM designation is an acronym
- Use the designation in connection with the name, logo, or signature of any firm or in any manner that might be interpreted as referring to an entity other than the Designated member
- Use lettering in the designation that is larger than the Designated member's name

C. Use of trademarks in Internet domain names, URLs, and e-mail addresses

1. Designated members of the Appraisal Institute may use the membership designations in their e-mail addresses provided that the designation(s) appear directly after the Designated member's name, as it would appear on letterhead or business cards.





Example of proper usage

- johndoesra@aol.com

-
2. The use of the designations must **NOT** be hyphenated (with the exception of the one hyphen within the AI-GRS and AI-RRS designations), and no additional words, symbols, letters, or numbers should be placed after the designation.

Examples of improper usage

- mai@aol.com
- johndoesra-mai@aol.com
- maijohndoe@aol.com
- johnsrparemax@aol.com

-   3. Designated members are specifically prohibited from using the membership designations as part of their Internet domain names or as URL addresses.  

Examples of improper usage

- www.johndoesrpa.com
- www.johndoemai.com
- www.johndoe.com/sra

D. Firms: Regulation No. 5 states:

“Provided that a firm has at least one owner, partner or employee who is a Designated Member of the Appraisal Institute and who provides Service(s) defined by the Appraisal Institute Code of Professional Ethics for that firm, such firm may include in its promotional materials a statement similar in content to the following:

(Name of firm) has as owners, partners or employees (number) individuals who hold the (designation) designation of the Appraisal Institute, (number) individuals who hold the (designation) designation of the Appraisal Institute, and (number) individuals who hold the (designation) designation of the Appraisal Institute (as appropriate). Some individuals may hold more than one Appraisal Institute designation.”



Quick Quiz. Designation Usage

For each of the following items, tell what is incorrect in the usage of designations.

1. John Doe, M.A.I.

2. Jean Doe, AI-RRS

3. Jack Doe, S-R-A

4. John Doe and Associates, MAI, Inc.

5. Jean Doe, MAI-SRA-AI-GRS-AI-RRS

6. Jean Doe, Member, Appraisal Institute (MAI)

7. Jean Doe, MAI (Member, Appraisal Institute)



Quick Quiz. Designation Usage, cont

For each of the following items, tell what is incorrect in the usage of designations.

8. In promotional materials: “ABC Appraisal Company has MAI Members of the Appraisal Institute.”

VI. Use of Designation Emblems and Appraisal Institute Logo

- A. The Appraisal Institute’s logo and its designation emblems may be used only by Designated members (as well as the Appraisal Institute, its chapters and regions, and entities holding a specific usage license).
- B. Strict requirements for their use are in Regulation No. 5.
 - 1. Emblems—Article III
 - 2. Logo—Article I
- C. Candidates for Designation, Practicing Affiliates, and Affiliates may not use the Appraisal Institute’s logo or designation emblems.
- D. The emblems and logo must be used in a dignified manner according to the requirements set forth.
- E. Designation emblems
 - 1. Designated members may
 - a. Use the designation emblem(s) that depict(s) the designation(s) they possess on their business cards, letterheads, Web sites, valuation reports, seals, and professional forms.
 - b. Display the designation emblem only once on each letterhead, correspondence, Web page, valuation report cover, business card, or advertising material.

2. Use of designation emblems must **NOT**

- a. Imply that a Candidate for Designation, Practicing Affiliate, Affiliate, or other person holds the Appraisal Institute designation.
- b. Be used in any manner that might be interpreted as referring to a person or an entity other than the Designated member.

F. Logo

1. Designated members (e.g., an MAI or an SRA) may use the Appraisal Institute logo on their letterhead, business cards, Web sites, and other material **ONLY** if all individuals in the Designated member's firm (sole proprietorship, partnership, corporation, or similar business entity) who perform services defined by the Appraisal Institute Code of Professional Ethics are Designated members, Candidates for Designation, and/or Practicing Affiliates of the Appraisal Institute.
2. The logo must **NOT** be displayed in any manner suggesting that the firm is affiliated with the Appraisal Institute.

G. Artwork and display of Appraisal Institute logo and designation emblems

1. Designated members must use only reproductions of the Appraisal Institute logo or designation emblems from electronic artwork obtained from the Appraisal Institute. Contact the Appraisal Institute Service Center or login to "My AI" at www.appraisalinstitute.org.⁴
2. Reproduce the Appraisal Institute logo and its designation emblems only in the official colors of the Appraisal Institute or in black and white.
3. Display the Appraisal Institute logo and its designation emblems with the registration mark ® immediately below and to the right of such logo or emblems to signify registration with the U.S. Patent and Trademark Office.
4. Appraisal Institute logo and designation emblems must **NOT** contain or be surrounded by or be part of any extraneous decoration or embellishment.

4. Designated members can access the request form at www.appraisalinstitute.org/myappraisalinstitute/membersonly/request_form.aspx www.appraisalinstitute.org/myappraisalinstitute/ethics/ethics_useofdsgr.aspx.

	Affiliate	Practicing Affiliate	Candidate for Designation	Designated Member
Acceptable to mention status orally or in writing	Yes	Yes	Yes	Yes
Acceptable use of status	May use on business cards, letterhead, and other publications May use under a heading concerning professional affiliations (but not professional associations or designations)	May use on business cards, letterhead, and other publications May use under a heading concerning professional associations (but not designations)	May use on business cards, letterhead, and other publications May use under a heading concerning professional associations (but not designations)	May use on business cards, letterhead, and other publications May use in e-mail addresses with the Designated member's full name, but not in domain names or URLs
Acceptable to use or reference one or more of the designations (MAI, SRA, SRPA, RIM, SREA, AI-GRS, AND AI-RRS)	No	No	No	Yes—a Designated member may use or mention the designation(s) that he or she has earned
Acceptable to use designation emblems	No	No	No	Yes, in accordance with rules. See Regulation No. 5 and <i>Trademark Usage Manual</i> .
Acceptable to use Appraisal Institute logo	No	No	No	Yes, if all persons in Designated member's firm who do work under SPP are Practicing Affiliates, Candidates for Designation, or Designated members of the Appraisal Institute. Must be in accordance with rules. See Regulation No. 5 and <i>Trademark Usage Manual</i> .
Acceptable to use the term <i>member</i> or <i>membership</i> to describe status	No	No	No	Yes, in accordance with rules. See Regulation No. 5 and <i>Trademark Usage Manual</i> .
Examples of <i>correct</i> usage	John Doe, Affiliate, Appraisal Institute Jane Doe is an Affiliate, Appraisal Institute	John Doe, Practicing Affiliate, Appraisal Institute Jane Doe is a Practicing Affiliate, Appraisal Institute	John Doe, Candidate for Designation, Appraisal Institute John Doe is a Candidate for Designation in the Appraisal Institute.	Jane Doe, MAI John Doe, SRA Jean Doe, MAI, SRA jackdoemai@jackappraisal.com

	Affiliate	Practicing Affiliate	Candidate for Designation	Designated Member
<p>Example of <i>incorrect</i> usage</p>	<p>Jean Doe, Affiliate Member of the Appraisal Institute John Doe and Associates, Affiliate of the Appraisal Institute</p>	<p>Jean Doe, Practicing Affiliate Member of the Appraisal Institute John Doe, P.A., Appraisal Institute</p>	<p>Jean Doe, MAI Candidate, Appraisal Institute John Doe, Candidate Member, Appraisal Institute John Doe, C.D., Appraisal Institute</p>	<p>Jane Doe, M-A-I John Doe, S.R.A. Jean Doe, MAI-SRA Jack Doe, MAI John@ohndoemai.com Jane Doe, sra Joe Doe, MAI (Member, Appraisal Institute) Jean Doe, AI-RRS John Doe, MAI-SRA-AI-GRS-AI-RRS</p>
<p>Unacceptable practices</p>	<p>Abbreviating <i>Affiliate</i> in any way Using <i>Affiliate</i> alone without the name of the individual Using <i>Affiliate</i> in connection with the name, logo, or signature of a firm, partnership, or corporation Using <i>Affiliate</i> under a heading concerning professional designations or memberships Using the terms <i>Member</i> or <i>membership</i> to describe status with the Appraisal Institute Using lowercase letter <i>A</i> for <i>Affiliate</i></p>	<p>Indicating that he or she is pursuing Appraisal Institute Designated membership Abbreviating <i>Practicing Affiliate</i> in any way Using <i>Practicing Affiliate</i> alone without the name of the individual Using <i>Practicing Affiliate</i> in connection with the name, logo, or signature of a firm, partnership, or corporation Using <i>Practicing Affiliate</i> under a heading concerning professional designations or memberships Using the terms <i>Member</i> or <i>membership</i> to describe status with the Appraisal Institute Using lowercase letters <i>P</i> and <i>A</i> for <i>Practicing Affiliate</i></p>	<p>Using the term <i>Member, Appraisal Institute</i>, if the individual does not already hold another Appraisal Institute designation Using the terminology <i>Candidate Member, Appraisal Institute</i> Abbreviating <i>Candidate for Designation</i> in any way Using <i>Candidate for Designation</i> alone without the name of the individual Using <i>Candidate for Designation</i> in connection with the name, logo, or signature of a firm, partnership, or corporation Using <i>Candidate for Designation</i> under a heading concerning professional designations or memberships Using lowercase letters <i>C</i> and <i>D</i> for <i>Candidate</i> for Designation</p>	<p>Using periods or spaces between the letters of any designation Using lowercase letters for the designation(s) Indicating that any designation is an abbreviation or acronym Using the designation in connection with the name, logo, or signature of any firm or in any manner that might be interpreted as referring to an entity other than the Designated member Using lettering in the designation that is larger than the Designated member's name</p>



Quick Quiz. Emblem Usage

For each of the following items, tell what is incorrect in the usage of the emblems and/or the logo.

1. Jacqueline Doe, MAI, hired a Web designer who cut and pasted the MAI emblem and the logo onto her Web page.
2. Julie Doe, SRA, hired a marketing manager for her firm who reproduced the SRA emblem and the logo for promotional material. The colors are almost exact.
3. Jack Doe, MAI, SRA, is principal and owner of his firm. He has three associates who are not Designated members, Candidates for Designation, Practicing Affiliates, or Affiliates of the Appraisal Institute. The firm's letterhead shows the MAI and SRA emblems adjacent to the names of Jack and his associates.
4. Jessica Doe, MAI, SRA, is principal and owner of her firm. She has three associates who are not Designated members, Candidates for Designation, Practicing Affiliates, or Affiliates of the Appraisal Institute. The firm's letterhead shows the logo.

Learning Objectives

Now that you have completed Part 2, you should be able to

- Explain why the Appraisal Institute strictly enforces its requirements regarding the use of its logo, membership designations, and emblems.
- Describe how Candidates for Designation and Practicing Affiliates can state their status with the Appraisal Institute.
- Describe how Designated members can use the Appraisal Institute designations, emblems, and logo.

Terms and Concepts to Remember

AI-GRS	Emblems	MAI
AI-RRS	Logo	SRA

Resources

The Appraisal Institute Bylaws and Regulations can be downloaded from the Appraisal Institute Web site at www.appraisalinsitute.org. Go to AI Resources and click on “Regulations & Bylaws” on the lower left side.

- Regulation No. 5: Use of Appraisal Institute Logo, Membership Designations and Emblems
- Regulation No. 1: Admission to General Candidacy and MAI Membership
- Regulation No. 2: Admission to Residential Candidacy and SRA Membership
- Regulation No. 3: Admission to Candidacy and Appraisal Review Designated Membership

Information on the use of the logo and emblems, and references to membership/candidacy/affiliation is found in the “My AI” section of the Appraisal Institute Web site. After logging in, click on “AI Business Tools” on the left side. Then scroll to the bottom.

- Electronic Designation Emblem Request Form
- Examples of Designation, Emblems, and Logo, and References to Membership, Candidacy, or Affiliation

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- Appraisal Institute Trademark Usage Manual

Additional questions may be directed to the Professional Practice department at professionalpractice@appraisalinstitute.org