

**Massachusetts Board of Real Estate Appraisers  
Minutes of the Board Meeting held September 14, 2023**

**Time: 10:30 a.m.**

**Location: Microsoft Teams**

**Members Present:**

Michael Giannelli, *Chair, Certified*

*Residential Appraiser Member*

Thomas Kokoliadis, *Vice Chair, Banking*

*Member*

Paula Wolfe, *Certified Residential Appraiser*

*Member*

Kenneth Dicks, *Certified General Appraiser*

*Member*

Timothy McDonough, *State Licensed*

*Appraiser/Municipal Assessor*

Tracy Sharkey, *Real Estate Broker Member*

William McLaughlin, *Certified General Appraiser Member*

Matthew Jenkins, *AMC Member*

**Members Not Present:**

**Administrative Staff Present:**

Kristin Mitchell, *Executive Director*

Lynn Read, *Board Counsel*

All Board members and staff appeared by videoconference.

- I. Call to Order** – Board Chair Michael Giannelli opened the meeting at 10:33 a.m.
- II. Vote on Minutes of July 13, 2023** – After brief discussion, a MOTION was made by Mr. Kokoliadis to approve the minutes of the open meetings held July 13, 2023, as written. The Motion was seconded by Mr. McDonough and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”
- III. Executive Director’s Report to the Board:** Kristin Mitchell reported to the Board that there were 41 licenses/permits issued since the last meeting. She also informed the Board there were five (5) complaints opened for Continuing Education (CE) violations as a result of the ongoing audit of CE claimed by licensees at renewal.

**Next Board Meeting Date**

Full Board Meeting Date: November 9, 2023

- IV. Board Counsel’s Report to the Board** – Board Counsel, Lynn Read, reported to the Board that AMC regulations were approved to go to Public Hearing. The tentative effective date is in November or December 2023.

Ken Dicks mentioned that Hawaii is sunseting their AMC statute and regulations.

- V. License Application Report:** A MOTION was made by Mr. McDonough to accept/approve the applications with the exception of CB & JC. The Motion was seconded by Mr. Jenkins and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

A MOTION was made by Mr. McDonough to allow the reviewer of the remaining applications to approve upon receipt of corrections. The Motion was seconded by Mr. Kokoliadis and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

<u>Applicant</u>	<u>License Type</u>	<u>Last Action Taken</u>
KS	CG	Board Approved
MF	LA	Board Approved
JC	CG	Board Requested Further Information
CB	CR	Board Approved
SR	LA	Board Approved
RF	LA	Board Approved

- VI. Education Report:** A MOTION was made by Mr. Dicks to accept reviewers’ decision for Education applications. The Motion was seconded by Mr. McDonough and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

<u>Provider Name</u>	<u>Course Name</u>	<u>Hours</u>	<u>Type</u>	<u>ResFlag</u>	<u>AQB</u>	<u>Recommendations</u>
Appraisal Institute	Review Theory - General	33	QE	NR	Yes	Staff Approved
Appraisal Institute	Review Case Studies – General	32	QE	NR	Yes	Staff Approved
Appraisal Institute	Review Case Studies - Residential	15	QE	R	Yes	Staff Approved
MA Chapter of IAAO	I.A.A.O. Course 300 - Fundamentals of Mass Appraisal	33.5	CE	R/NR	Yes	Staff Approved
The CE Shop	Appraisal Ethics and Valuation Bias	3	CE	E	Yes	Staff Approved
The CE Shop	Characteristics Influencing Appraisals	6	CE	E	Yes	Staff Approved
The CE Shop	Reviewing Property Ownership and Real Estate Markets	7	CE	E	Yes	Staff Approved
The CE Shop	Reviewing Appraisal Valuation Procedures	4	CE	E	Yes	Staff Approved
Appraisal Institute	Artificial Intelligence, Blockchain, and the Metaverse: Implications for Valuation	7	CE	R/NR/E	Yes	Staff Approved
American Society of Appraisers	2023 ASA International Conference	14	CE	R/NR/E	No	Board Approved
MA, RI & ME Chapter of Appraisal Institute	Marshall & Swift - Residential Program	7	CE	R/NR	No	Board Approved
MA, RI & ME Chapter of Appraisal Institute	Marshall & Swift - Commercial Program	7	CE	R/NR	No	Board Approved

Appraiser eLearning LLC	The Life of an Appraisal - What Happens Next?	4	CE	R/NR/E	No	Board Approved
MA Chapter of IAAO	I.A.A.O. Course 112 - Income Approach to Valuation II	33.50	CE	NR	No	Board Approved
MBREA	2023 New England Appraisers Expo Residential Session	3	CE	NR/R	No	Board Approved
MBREA	2023 New England Appraisers Expo General Session	4	CE	NR/R	No	Board Approved
MBREA	2023 New England Appraisers Expo Commercial Session	3	CE	NR/R	No	Board Approved
Appraiser eLearning LLC	Measuring Square Footage with ANSI Z765-2021	4	CE	NR/R/E	No	Board Approved
MBREA	APPRAISING REAL ESTATE AFTER A NATURAL DISASTER	4	CE	R/NR	No	Board Approved
Appraiser eLearning LLC	Creating Formulas that Work	7	CE	R/NR/E	No	Board Approved

## VII. Discussion:

(a) **Delegation of Authority to Open Complaints for Continuing Education Violations:**

Ms. Read and Ms. Mitchell asked the Board to authorize them to move complaints that are only continuing education to be forwarded to the office of prosecutions without coming before the Board. The Board requested to table the discussion.

(b) **CORI Policy:** Ms. Read presented to the Board the CORI Policy with the changes suggested by the agency. Members suggested corrections.

A MOTION was made by Mr. Dicks to adopt the CORI Policy with corrections. The Motion was seconded by Mr. McDonough and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

(c) **Review Draft Regulations addressing PAVE Dashboard and PAREA Requirements:** Ms. Read presented draft regulations for 254 CMR 2.00-11.00.

A MOTION was made by Mr. Kokoliadis to table discussion of 264 CMR 2.00. The Motion was seconded by Mr. Dicks and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

A MOTION was made by Mr. Kokoliadis to adopt the proposed changes to 264 CMR 3.00 as written. The Motion was seconded by Mr. McDonough and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

A MOTION was made by Mr. Kokoliadis to adopt the proposed changes to 264 CMR 4.00 as written. The Motion was seconded by Mr. Dicks and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

After brief discussion, a MOTION was made by Mr. McDonough to table discussion of 264 CMR 5.00. The Motion was seconded by Mr. Dicks and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

After brief discussion, a MOTION was made by Mr. McDonough to table discussion of 264 CMR 6.00. The Motion was seconded by Mr. Jenkins and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

A MOTION was made by Mr. McDonough to adopt the proposed changes to 264 CMR 9.00 as written. The Motion was seconded by Mr. Kokoliadis and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

A MOTION was made by Mr. McDonough to adopt the proposed changes to 264 CMR 11.00 as written. The Motion was seconded by Mr. McLaughlin and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

**VIII. Matters Not Reasonably Anticipated:** Nothing to Report

**IX. Public Comment:** Chair opened the floor to the public. Teresa MacNutt asked the Board about the 75% of work and clarity of her signing the log/report.

Applicant Kevin Sullivan asked the Board about his application. Ms. Mitchell advised he was approved at this meeting.

**X. Executive Session:** None

**XI. Quasi-Judicial Session CLOSED per M.G.L. c. 30A, § 18(d):** None

**XII. Complaints and Investigative Conference, Closed Session per M.G.L. c. 112, s. 65C:**

At 1: 33 p.m. a MOTION was made by Mr. McDonough to exit Open Session and enter Closed Investigative Conference under M.G.L. c. 112, s. 65C. The motion was seconded by Mr. Dicks and unanimously adopted by the Board by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

After the Investigative Conference the following was reported by the Board:

- a. Discussion of the terms of negotiated settlement of complaint(s):
  - i. 2022-000849-IT-ENF: Gave guidance to prosecutor.
- b. Cases:

<b>Docket</b>	<b>Board Ratification of Subcommittee Recommendation</b>
2022-001078-IT-ENF	Referred to Prosecutions
2023-000203-IT-ENF	Dismissed with Advisory
2023-000223-IT-ENF	Referred to Prosecutions
2023-000276-IT-ENF	Referred to Prosecutions

<b>Docket</b>	<b>Cases to Be Reviewed</b>
2023-000287-IT-ENF	Dismissed
2023-000504-IT-ENF	Referred to Prosecutions
2023-000505-IT-ENF	Referred to Prosecutions
2023-000506-IT-ENF	Referred to Prosecutions
2023-000507-IT-ENF	Referred to Prosecutions
2023-000508-IT-ENF	Referred to Prosecutions

**XIII. Adjourn:**

Mr. Dicks made a MOTION to adjourn the meeting at 2:32 p.m., seconded by Ms. Sharkey and unanimously adopted by a roll call vote: Giannelli – “Yes;” Kokoliadis– “Yes;” Dicks – “Yes;” Wolfe – “Yes;” Jenkins- “Yes;” McDonough – “Yes;” Sharkey – “Yes;” McLaughlin – “Yes.”

**List of Documents Used in Open Meeting:**

1. Agenda for meeting of September 14, 2023
2. Draft Minutes of July 13, 2023
3. Draft Regulations 264 CMR 2.00, 3.00, 4.00, 5.00, 6.00, 9.00, and 11.00

The above Minutes were approved at the Open Meeting  
held November 9, 2023



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Kristin Mitchell, Executive Director  
Board of Real Estate Appraisers