

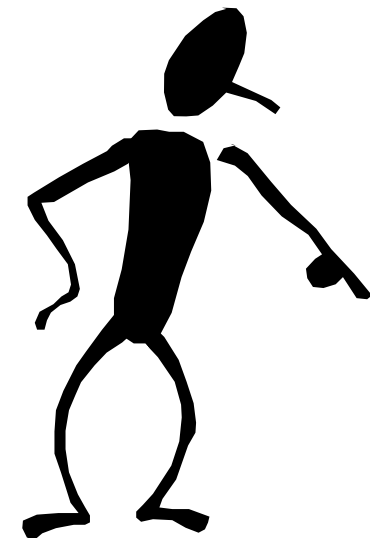
Understanding The Appraisal Problem

Wednesday December 11, 2019

Scott Cullen

This post-conference .PDF includes:

- conference slides (lower right numbers match presentaion)
- hidden slides (lower right numbers □ in sequence)
- post-conference slides (added at end)



Understanding The Appraisal Problem

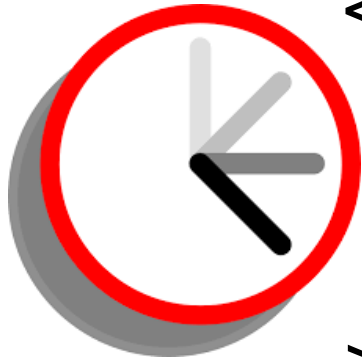


I am not a CTLA representative from any organization and I do not speak for CTLA.



I do not speak for ASCA or ISA.

Understanding The Appraisal Problem



\leq 1st half lecture



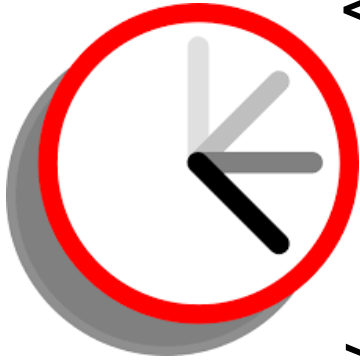
\geq 2nd half Q & A and audience participation

Questions about the appraisal problem.

No case capsules, stories,
opinions, position statements...



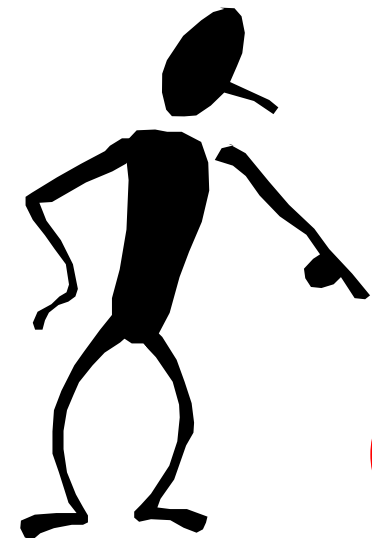
Understanding The Appraisal Problem



\leq 1st half lecture

\geq 2nd half Q & A and audience participation

Please hold your questions.




Handouts

1

[< home](#)

Tree Appraisal: Understanding the Appraisal Problem, Scope of Work, and Assignment

By Scott Cullen, RCA #348



AMERICAN SOCIETY OF CONSULTING ARBORISTS | 3 | ARBORICULTURAL CONSULTANT VOLUME 51 ISSUE 1 2018

4

[< home](#)

Trees, Real Estate, and Market Value: The Real Deal

By Scott Cullen, RCA #348

AMERICAN SOCIETY OF CONSULTING ARBORISTS | 13 | ARBORICULTURAL CONSULTANT VOLUME 49 ISSUE 4 2016

5

Handouts

SUPREME COURT OF NOVA SCOTIA

Citation: *Romkey v. Osborne*, 2019 NSSC 56

Date: 20190221

Docket: Hfx No. 460044

Registry: Halifax

Between:

Paul Romkey and Christine Romkey, Applicants

v.

Robert Osborne, Respondent

5

a trial court



Handouts

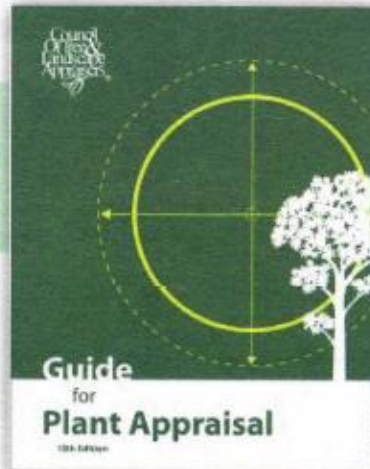
TREE SERVICE CANADA



BOOK REVIEW

Guide for Plant Appraisal, 10th Edition

CTLA, 2018. *Guide for Plant Appraisal, 10th Edition*. Champaign IL: International Society of Arboriculture. ISBN 978-1-943378-02-9.



2

**A Key to Tree Appraisal:
In litigation assignment is
critical**

3

Five Handouts

1



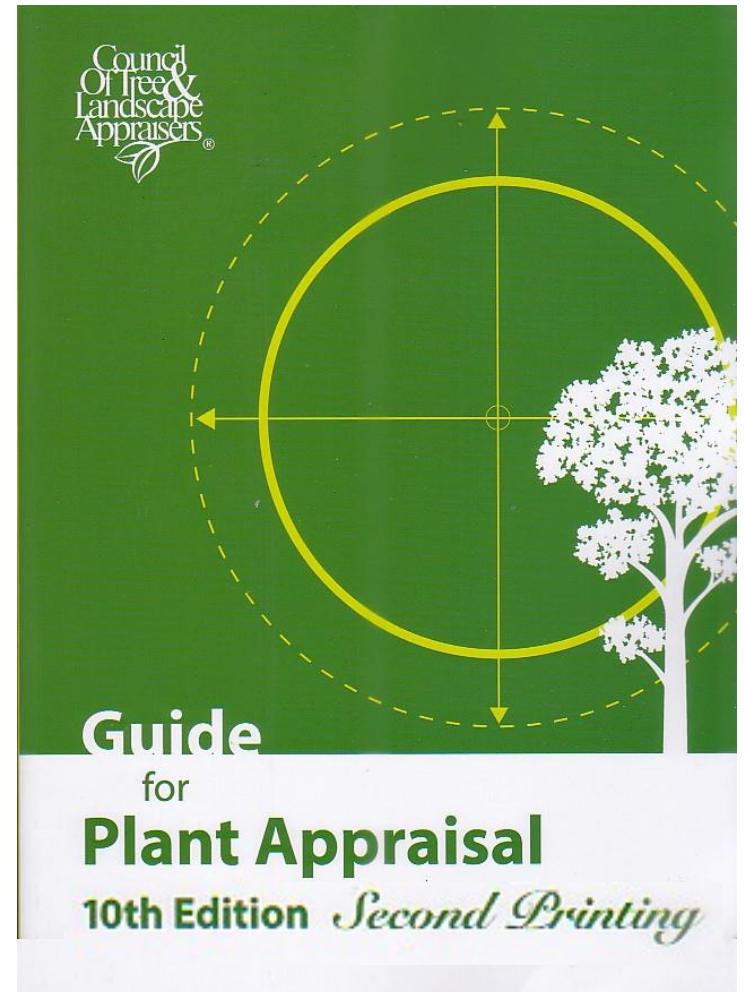
[< home](#)

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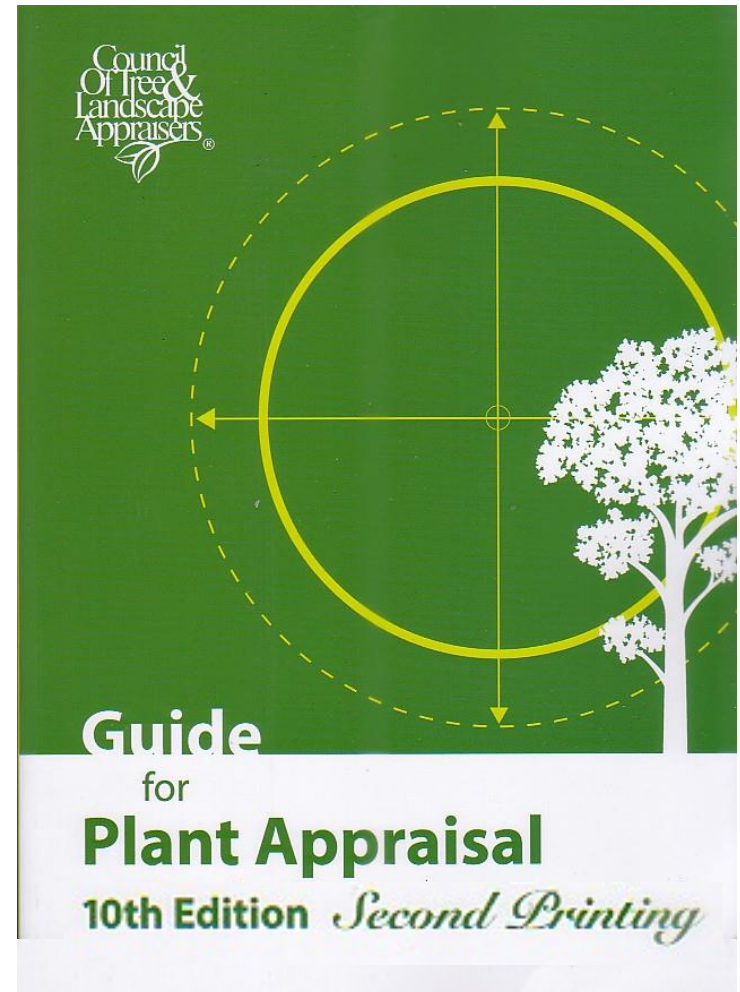
Working Reference



Understanding The Appraisal Problem

Today's Message:

Identification of the **appraisal problem** is the best part of *10th Edition* and its most important contribution.

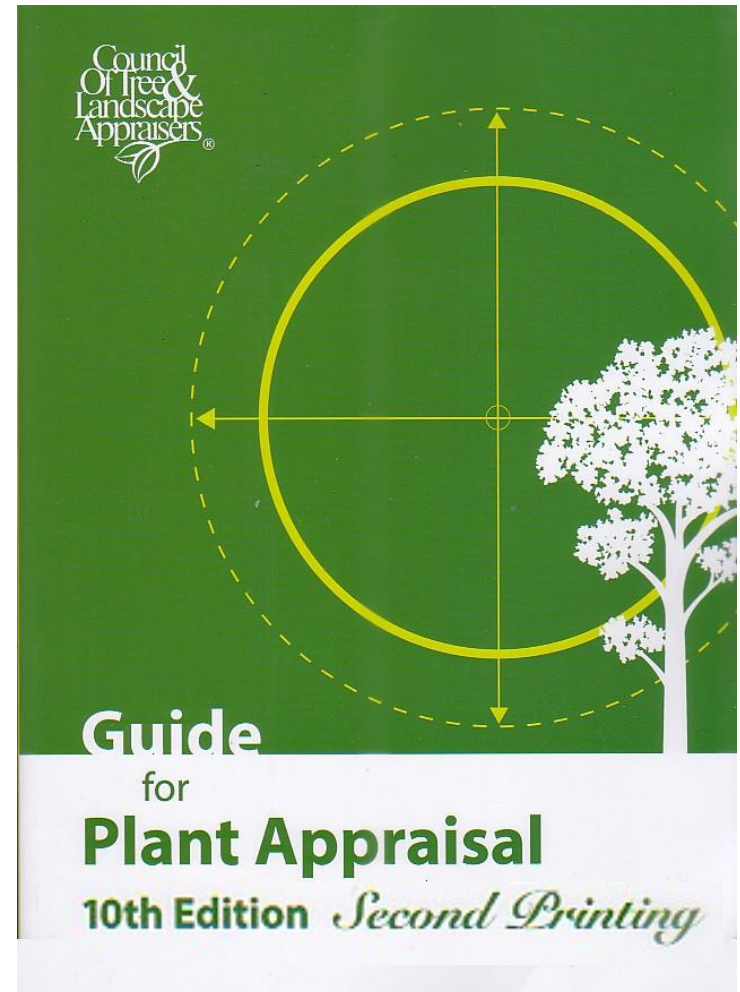


Understanding The Appraisal Problem

Working Reference

Today's Message:

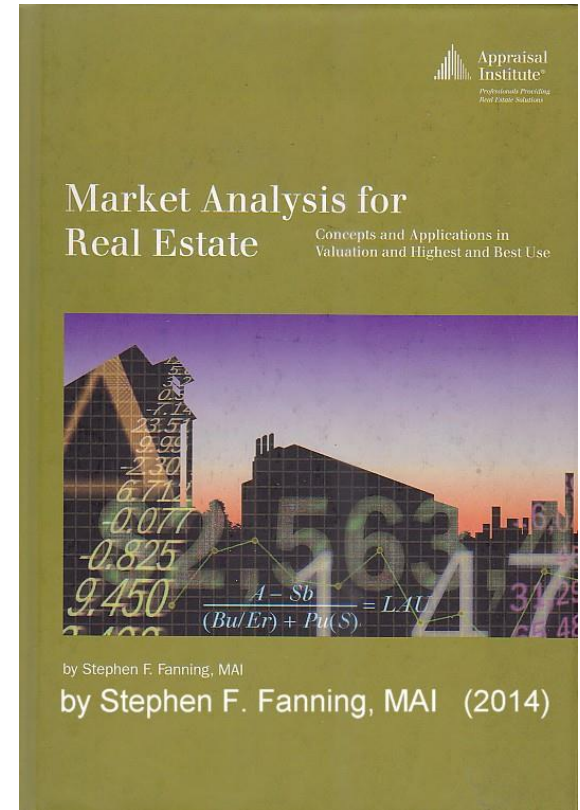
The culture of plant appraisal should be about identifying and solving the **appraisal problem**.



Understanding The Appraisal Problem

Today's Message:

"Step. 1. The scientific method begins with identification of the problem. Sometimes identifying the problem correctly can be 90% of the solution. The appraisal process also begins with identification of a problem." (p.7)

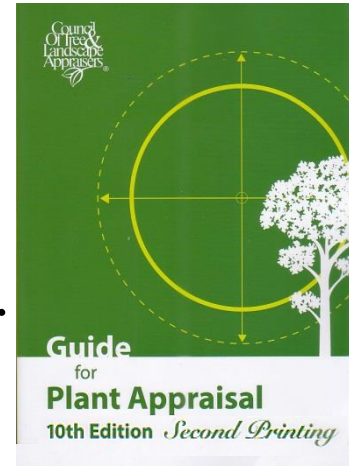


Understanding The Appraisal Problem

What is appraisal?

Appraisal: the act or process of developing an opinion of value, cost, or some other specified assignment result. Interchangeable with valuation.

(Glossary)



Understanding The Appraisal Problem

What is appraisal, really?

Every appraisal is an answer to a question or an aid to a decision.

Appraisal is all about problem solving.

Understanding The Appraisal Problem

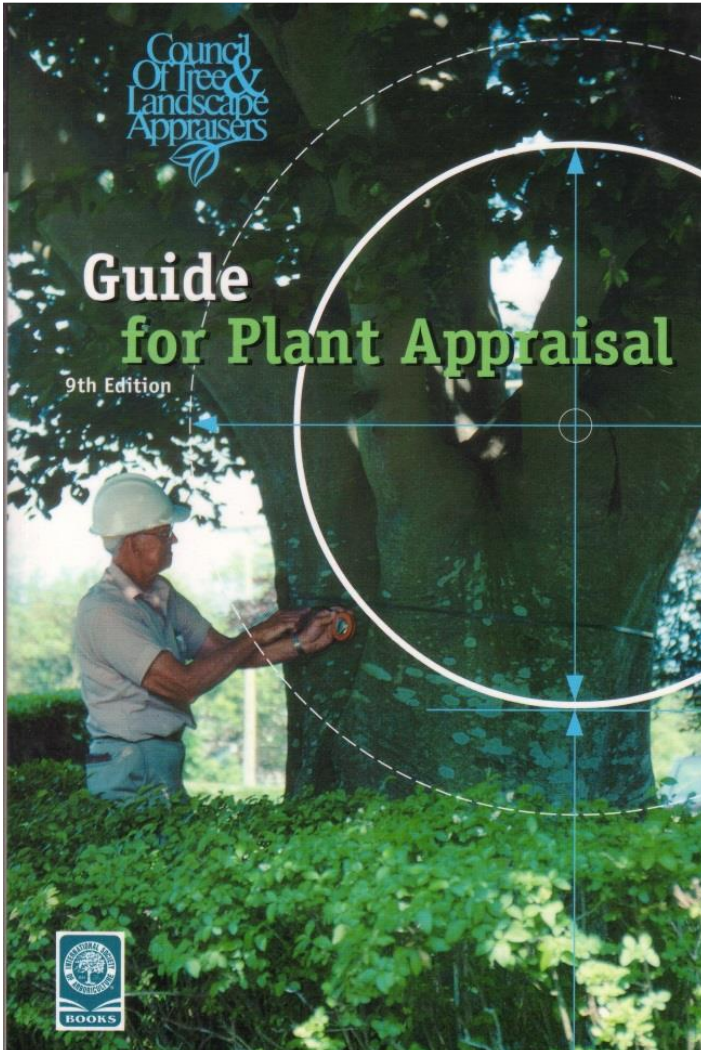
What is appraisal, really?

Every appraisal is an answer to a question or an aid to a decision.

Appraisal is problem solving.

So we **MUST** understand what the problem is: that is, what the question is, or what decision needs to be made.

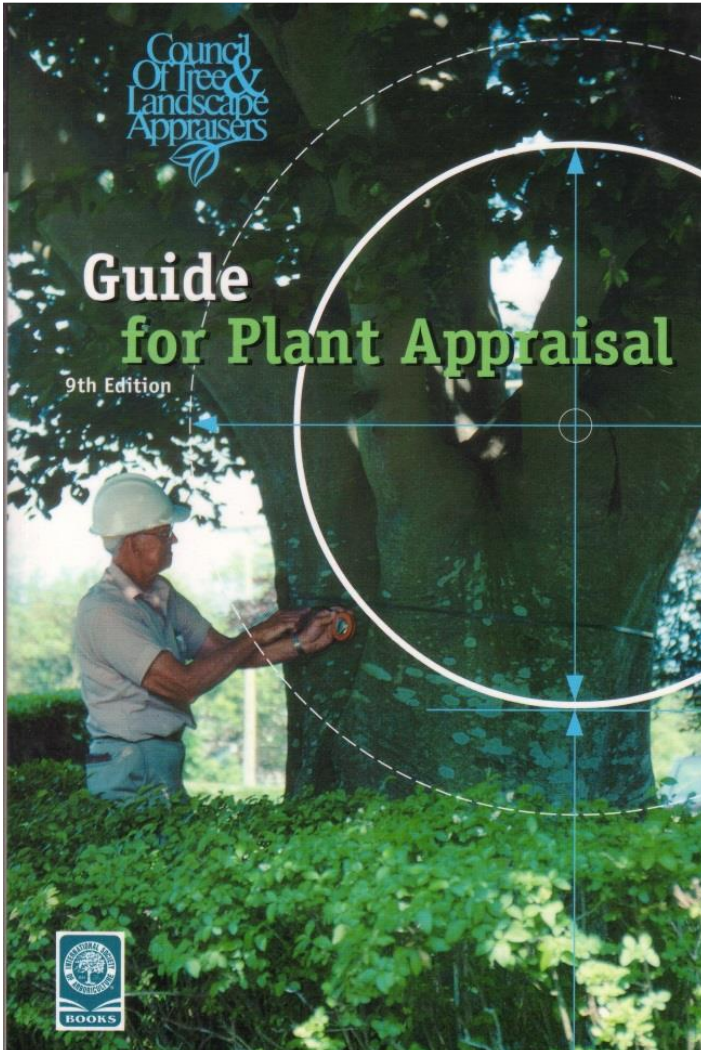
The Appraisal Problem is Not a New Concept



Page 1. Plant appraisals are used for various reasons...

Page 19. The purpose of an appraisal is defined by the client's needs and questions. If the client's questions are understood, the purpose of the assignment can also be clearly stated.

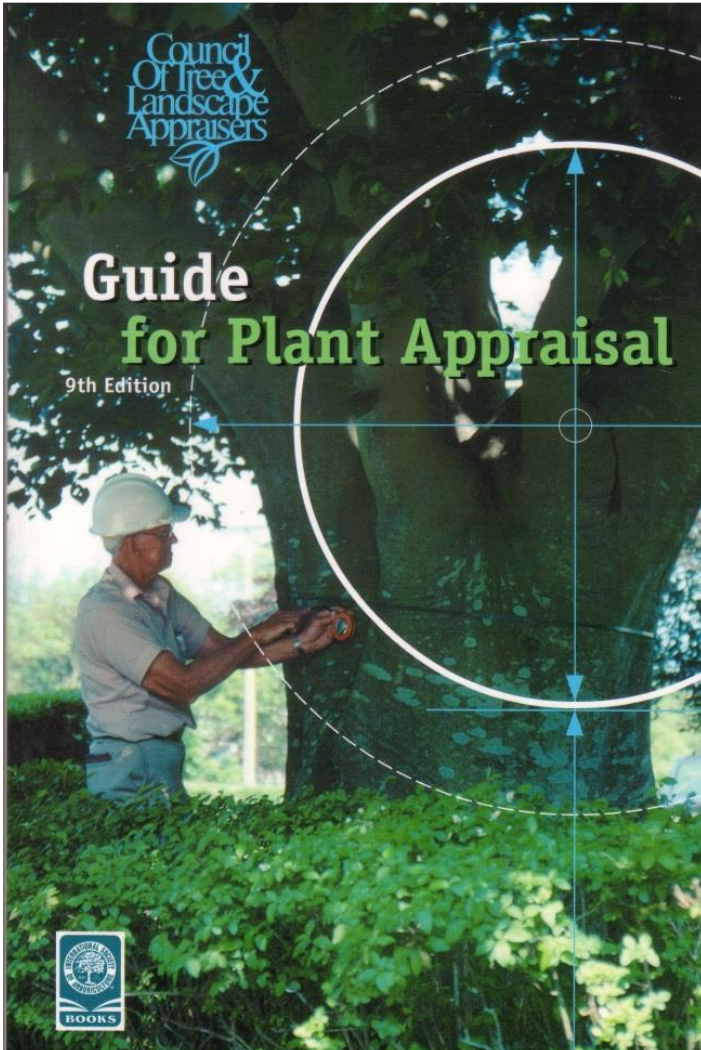
The Appraisal Problem is Not a New Concept



Page 1. Plant appraisals are used for various reasons...

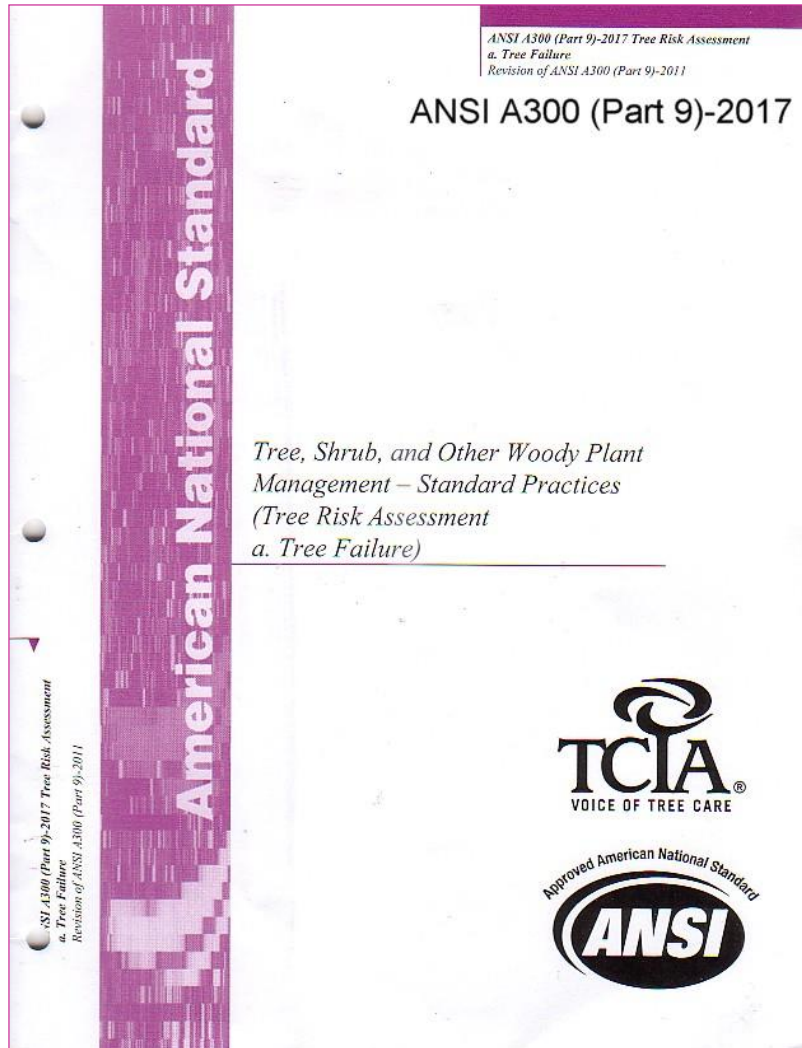
Page 19. The purpose of an appraisal is defined by the client's needs and questions. If the client's questions are understood, the purpose of the assignment can also be clearly stated. ...the type of value sought must be defined at the outset.

The Appraisal Problem is Not a New Concept

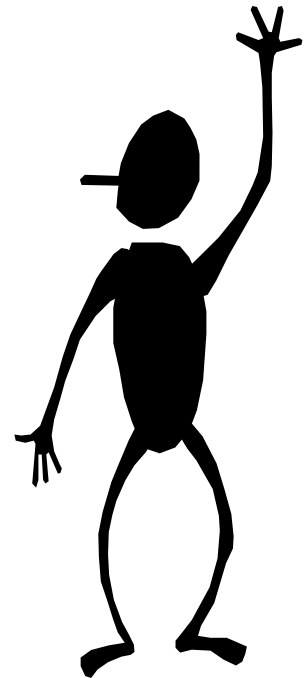


Page 20. The valuation process begins when an appraiser performs a needs assessment for the appraisal and ends with a conclusion to the client.

Identifying the Appraisal Problem is an Essential Step



Use A300?



Identifying the Appraisal Problem is an Essential Step

93.1 An objective shall be established before beginning...

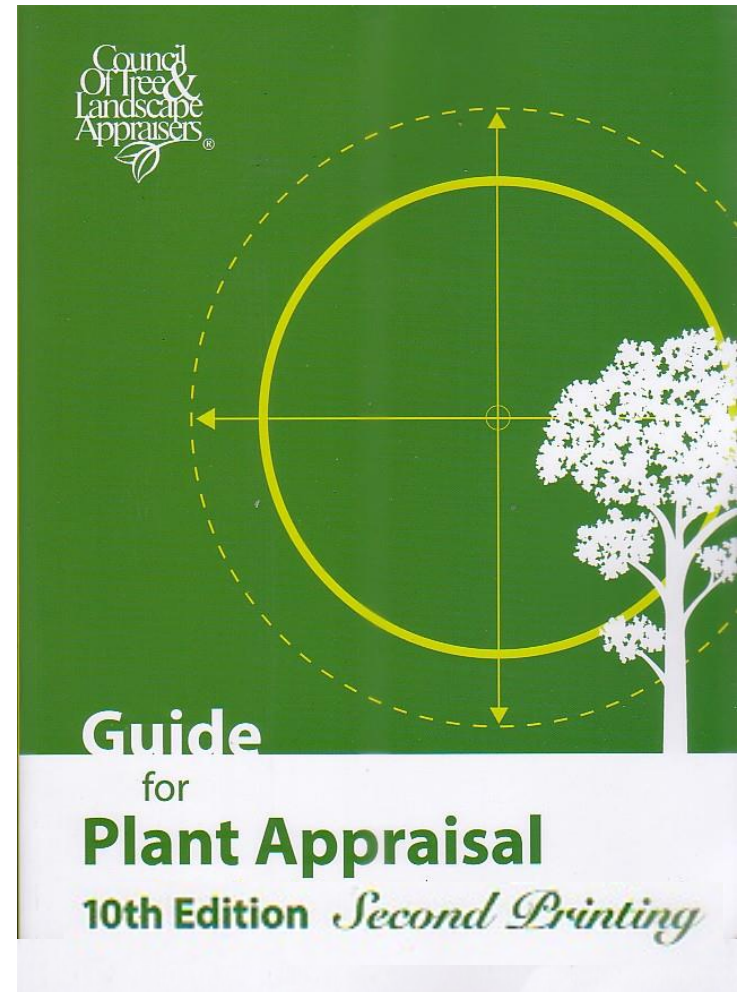
93.2 Objectives shall be based on the context of the situation and client expectations.

The **appraisal problem** is analogous.

Not discretionary. Not optional.

Understanding The Appraisal Problem

Preface. ...the key step in the appraisal process is identifying the appraisal problem.



The Appraisal Process - The Problem in Context

Chapter 3. p. 17. The Appraisal Process.

Step 1. Define the appraisal problem.

Step 2. Define the Scope of Work.

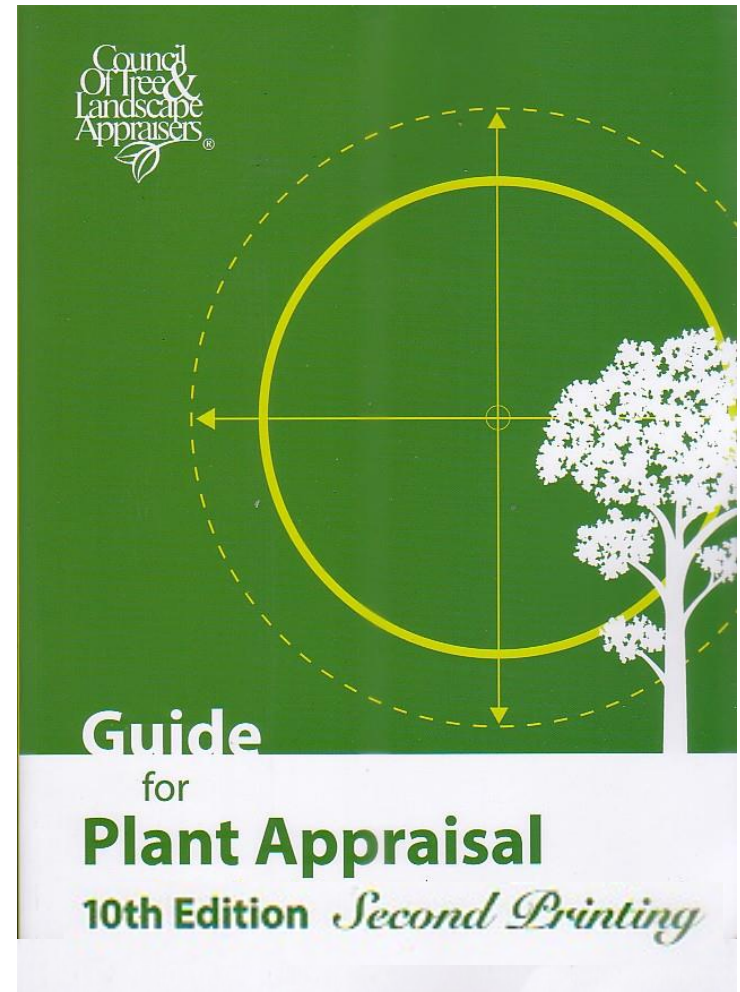
Step 3. Collect relevant data.

Step 4. Analyze data (approaches, methods, and techniques).

Step 5. Reconciliation [when necessary,
see post-conference slide].

Step 6. Report.

6 STEPS

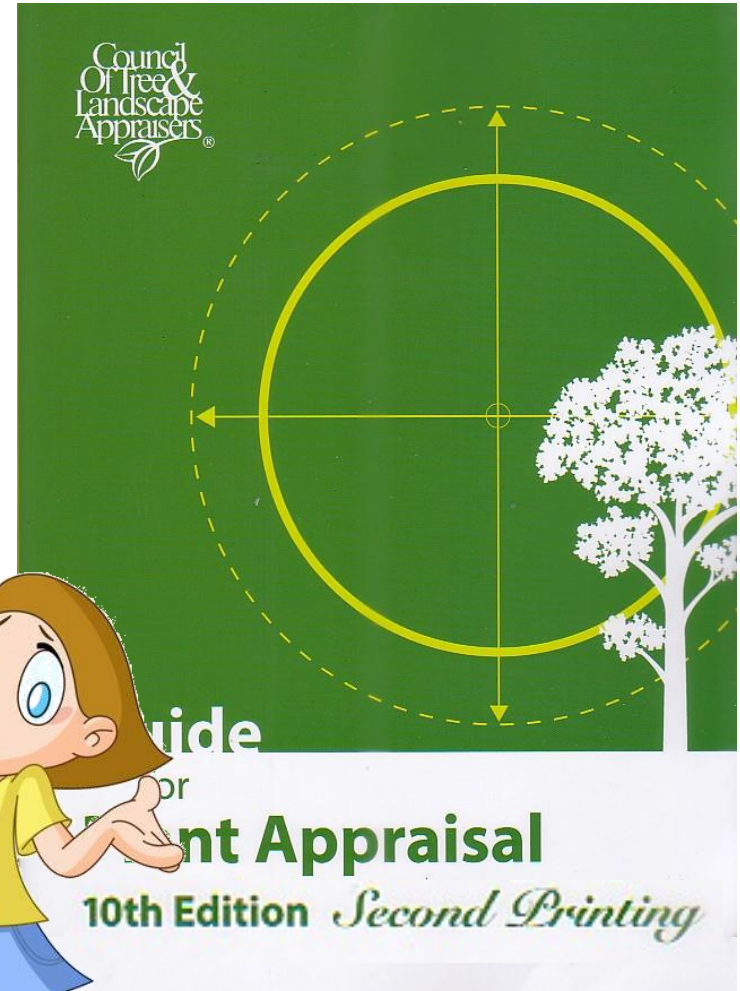


What Is The Appraisal Problem?

What Is The Appraisal Problem?

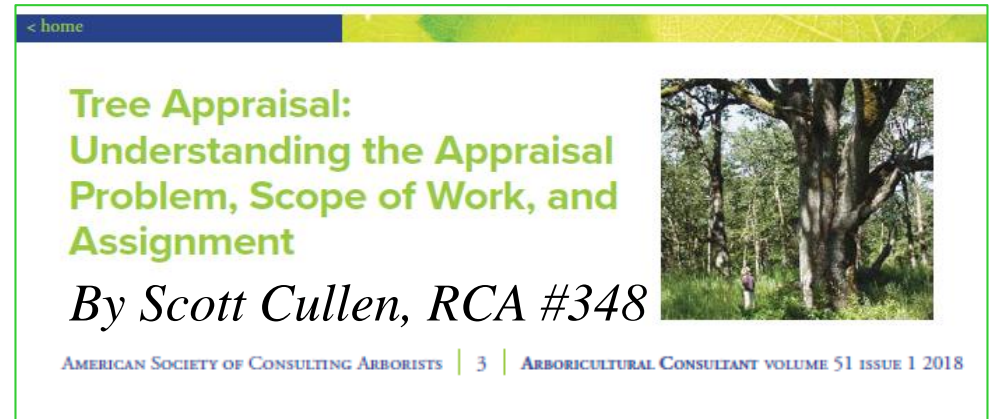
“Appraisal problem” is not defined in-text or in the Glossary.

You won’t even find “appraisal problem” in the Index.



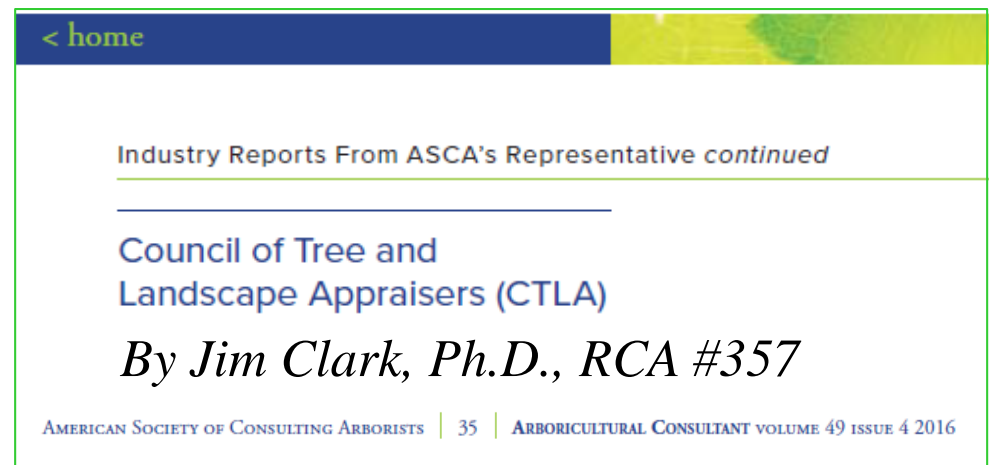
What Is The Appraisal Problem?

The appraisal problem is a careful and specific statement of the client's question about value and its context.



In your handouts. Not in 10th Edition.

The appraisal problem is the context for the assignment, the question being asked, and the issue to be resolved.



What Is The Appraisal Problem?

Appraisal Problem <> Scope of Work <> Assignment

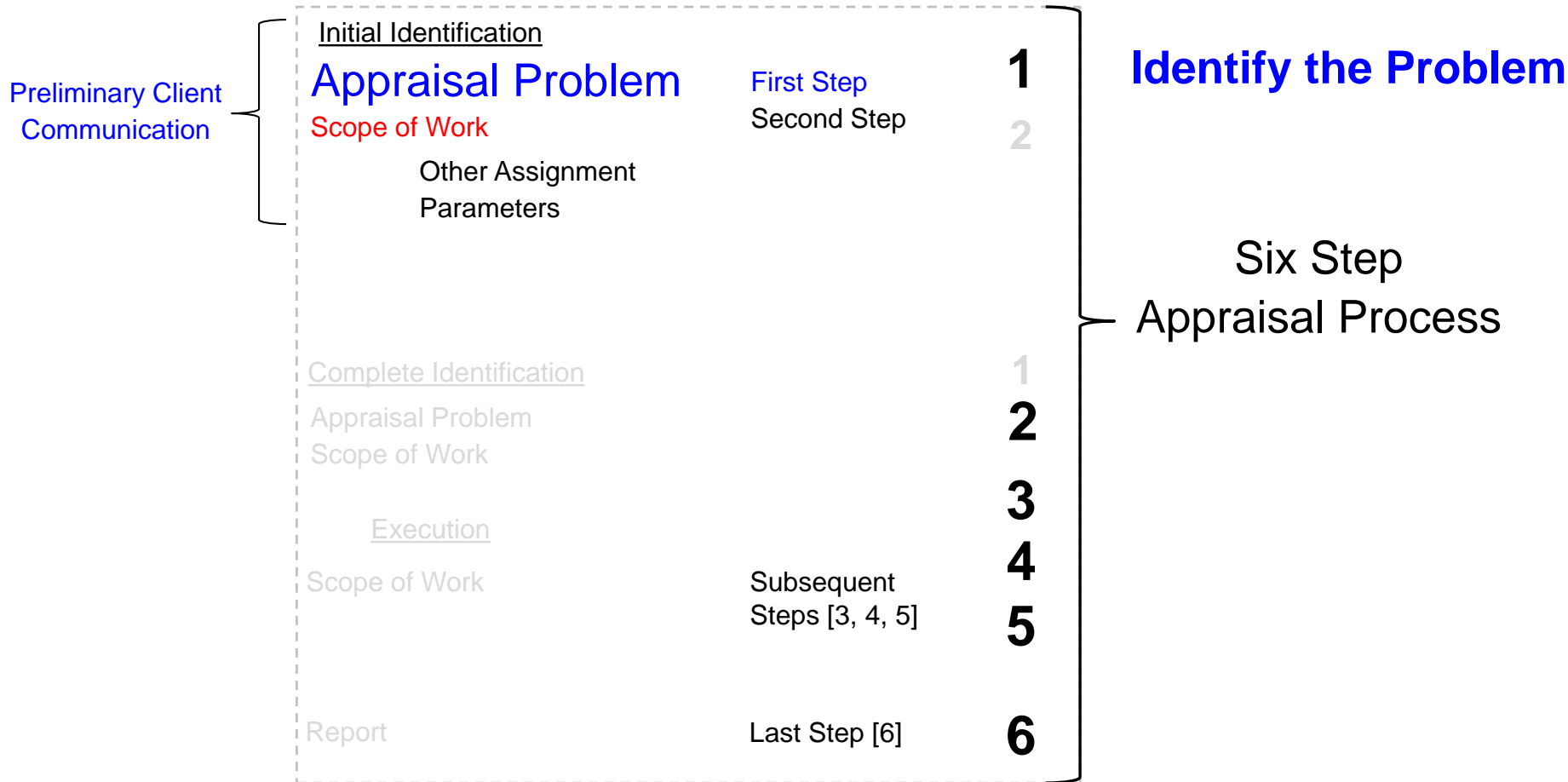
They are not synonyms

They are not interchangeable



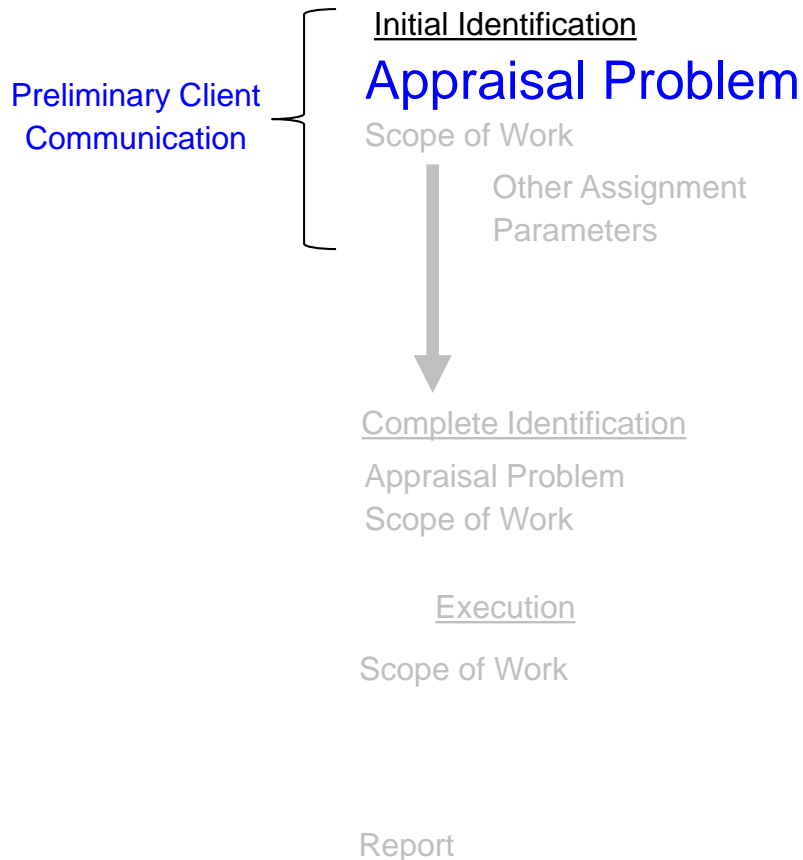
**Tree Appraisal:
Understanding the Appraisal
Problem, Scope of Work, and
Assignment**

By Scott Cullen, RCA #348

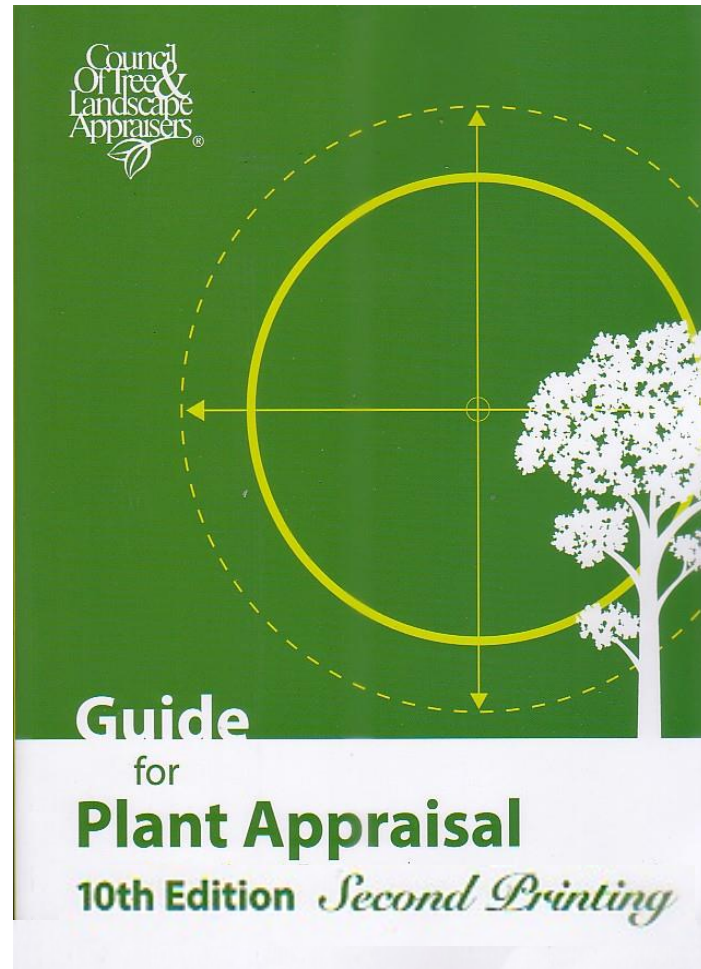


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“Following initial contact with the client but before entering into a[n] ...agreement, the...appraiser must decide whether to accept the **assignment.**” (p.18)



Preliminary Client
Communication

Initial Identification

Appraisal Problem

Scope of Work

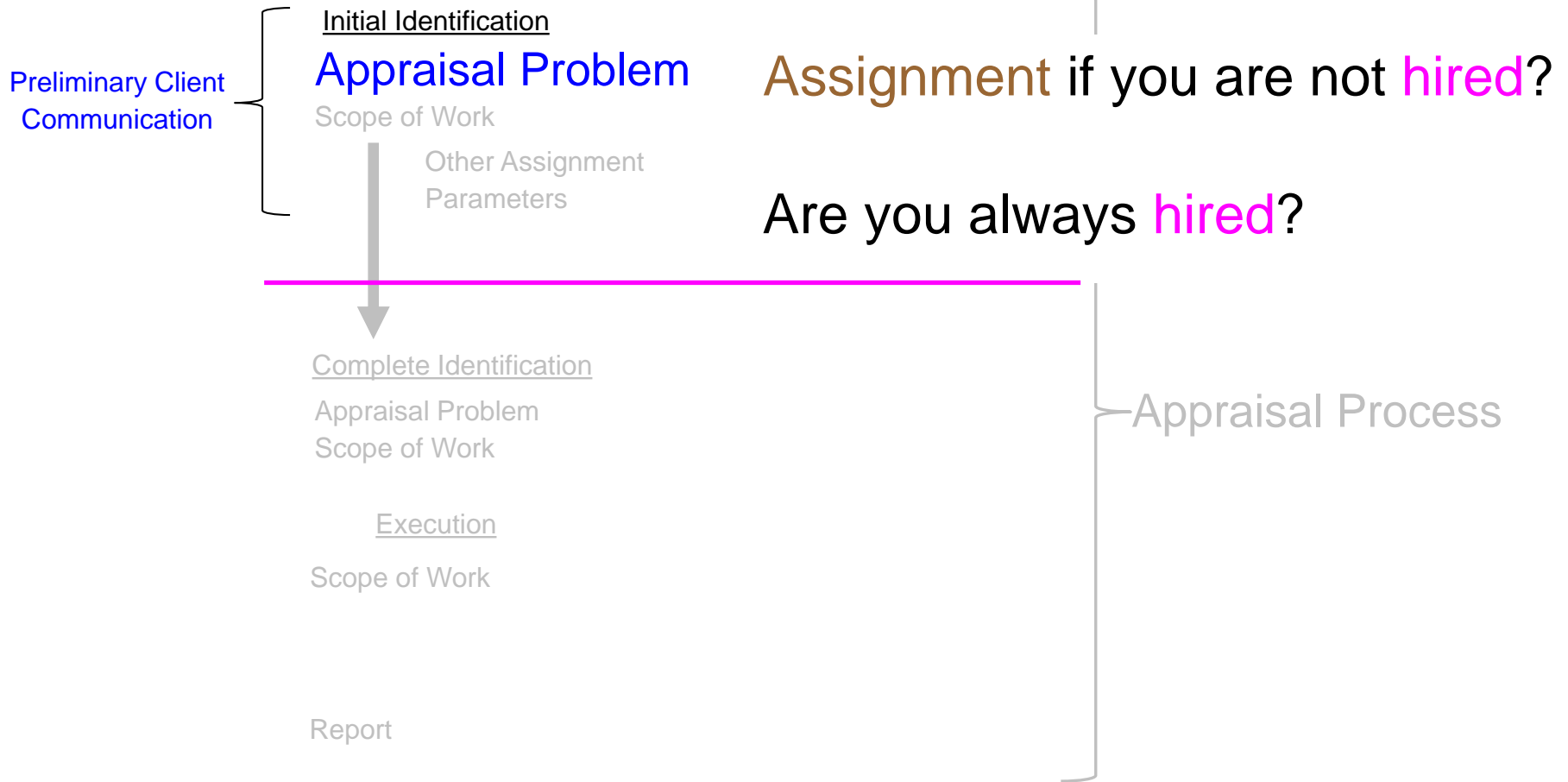
Other Assignment
Parameters

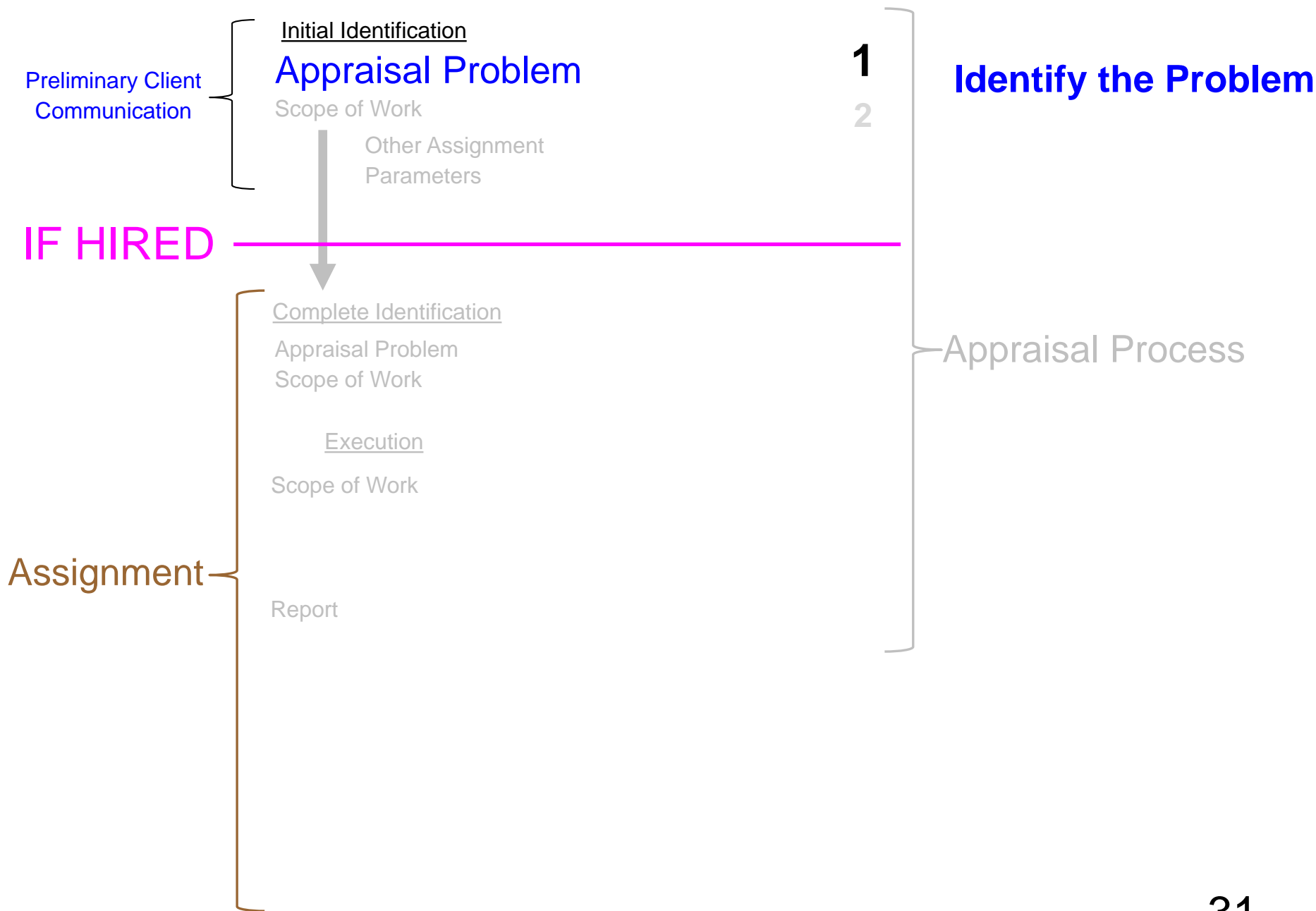
Assignment

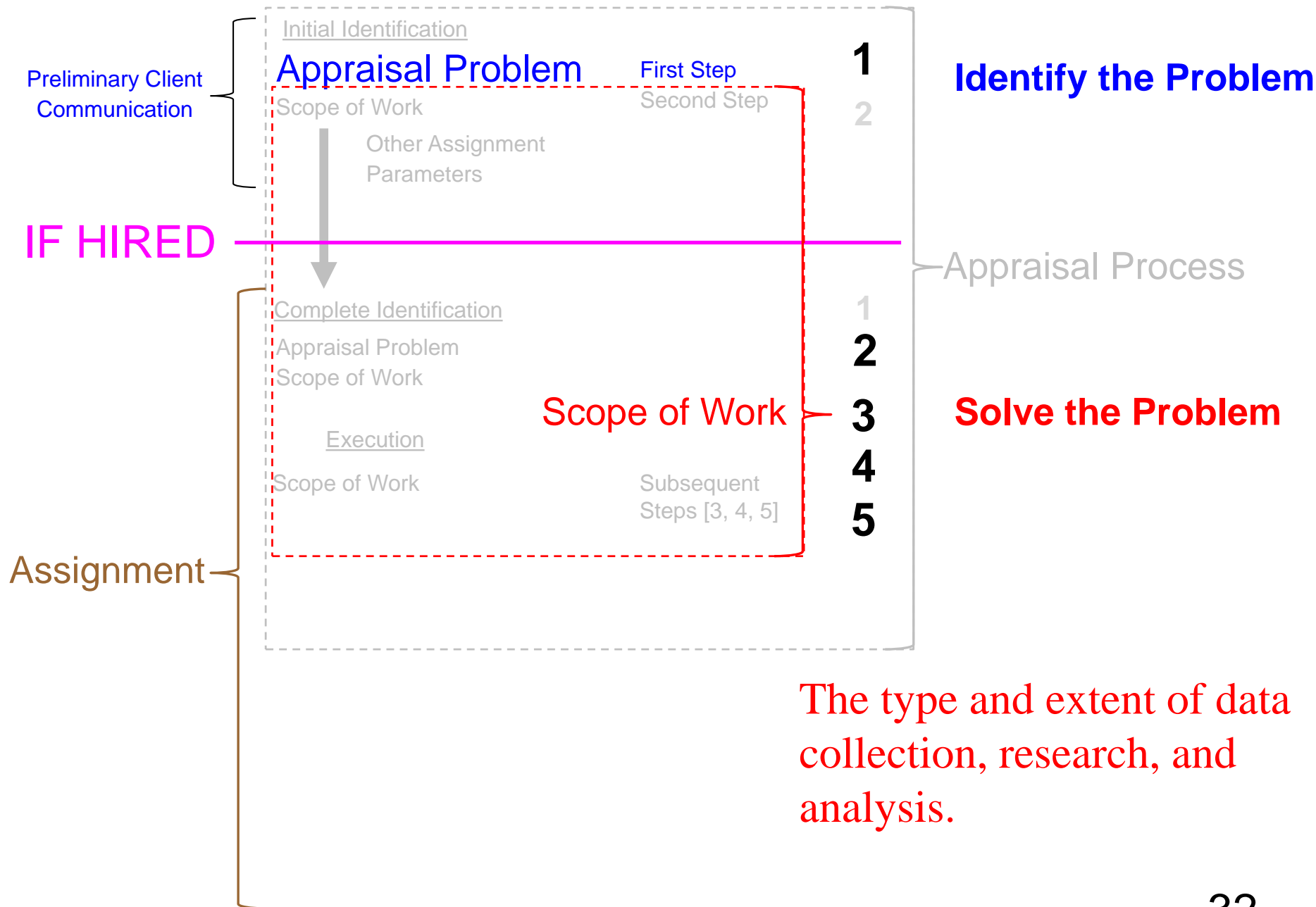
Example Conditions Precluding Acceptance of an Assignment

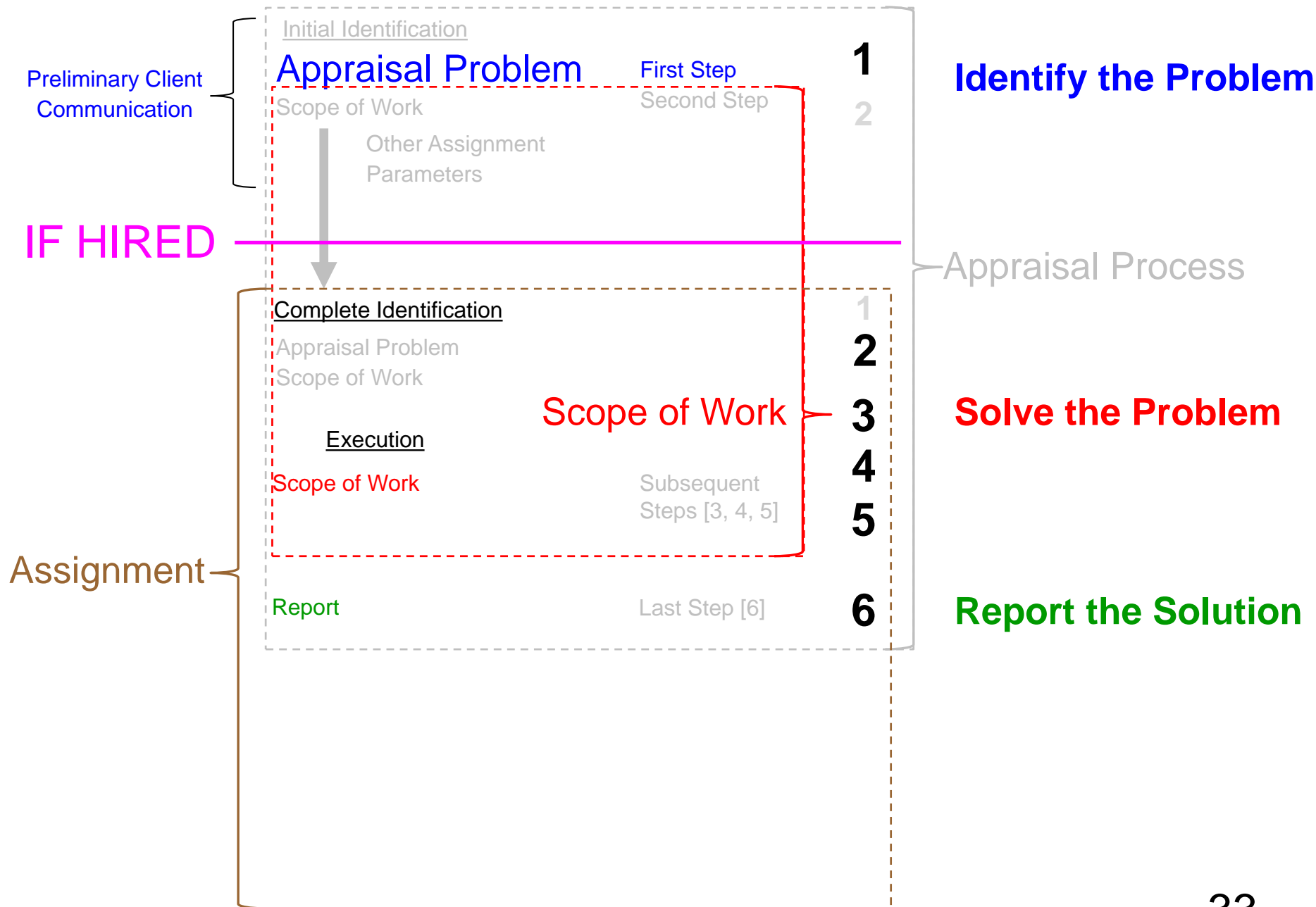
- The Appraisal Problem is inadequately identified.
- The Appraisal Problem is outside the appraiser's competence.
- The appraiser cannot complete the Assignment in a timely manner.
- The appraiser has a conflict of interest.
- The potential client will not pay for an adequate Scope of Work.
- The appraiser and potential client agree that the expense of the Assignment would not be justified by the potential benefit of the information developed.

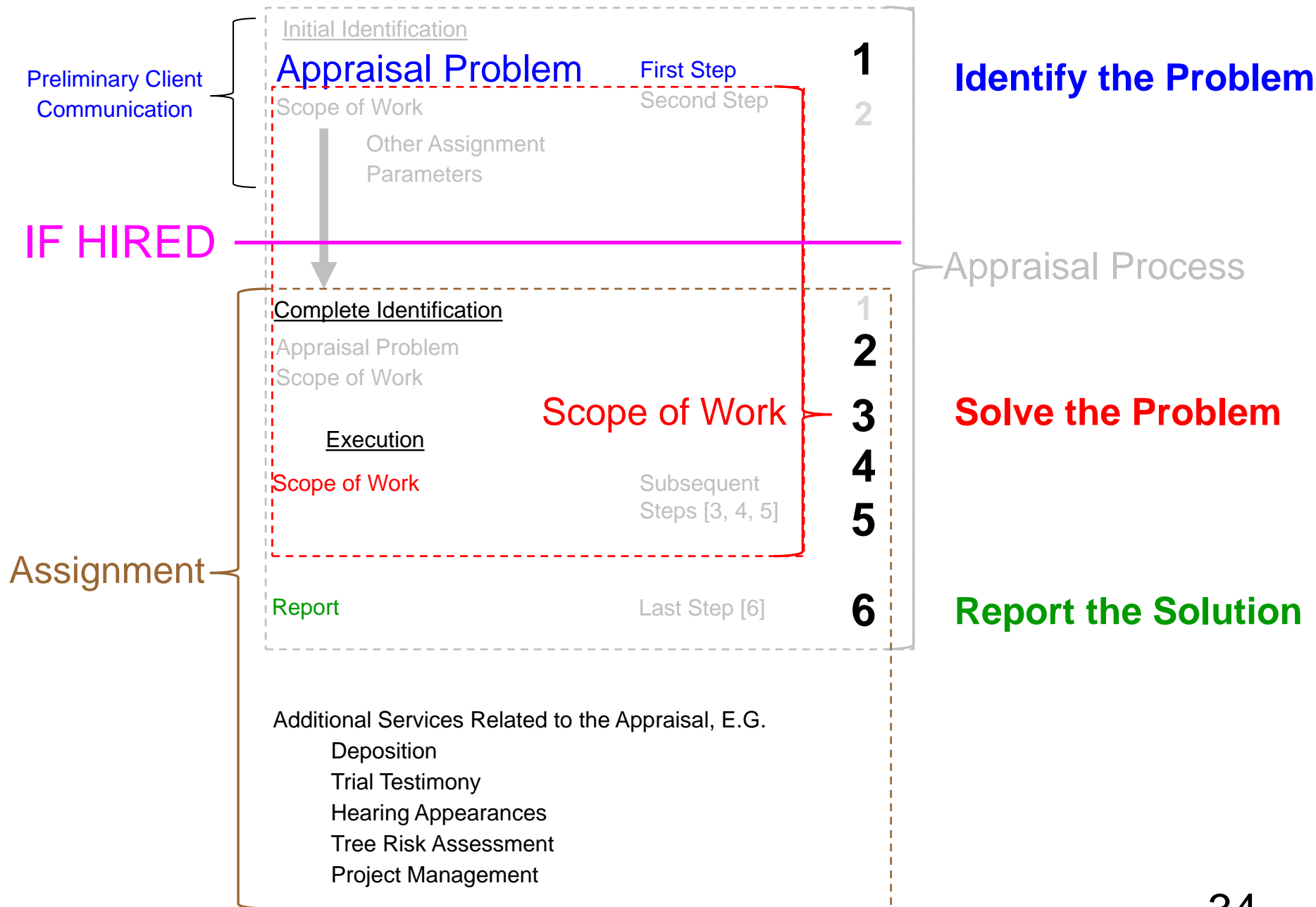
**Tree Appraisal:
Understanding the Appraisal
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Assignment**







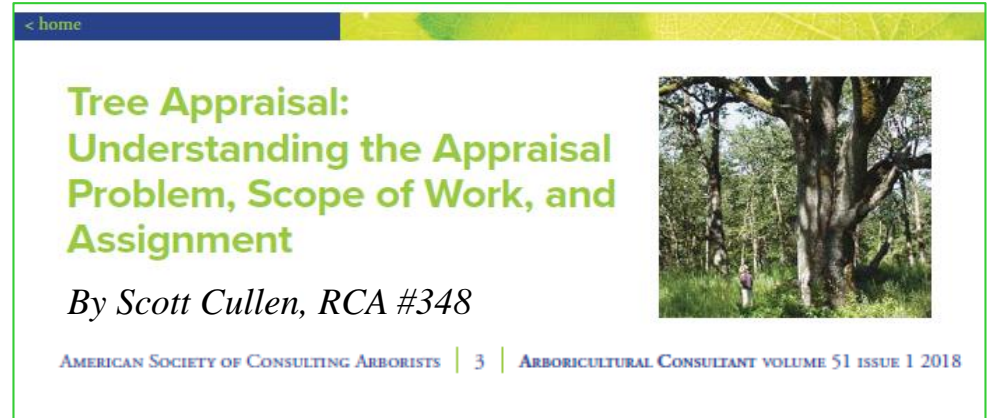




The Appraisal Problem Defined

A clearly defined term.

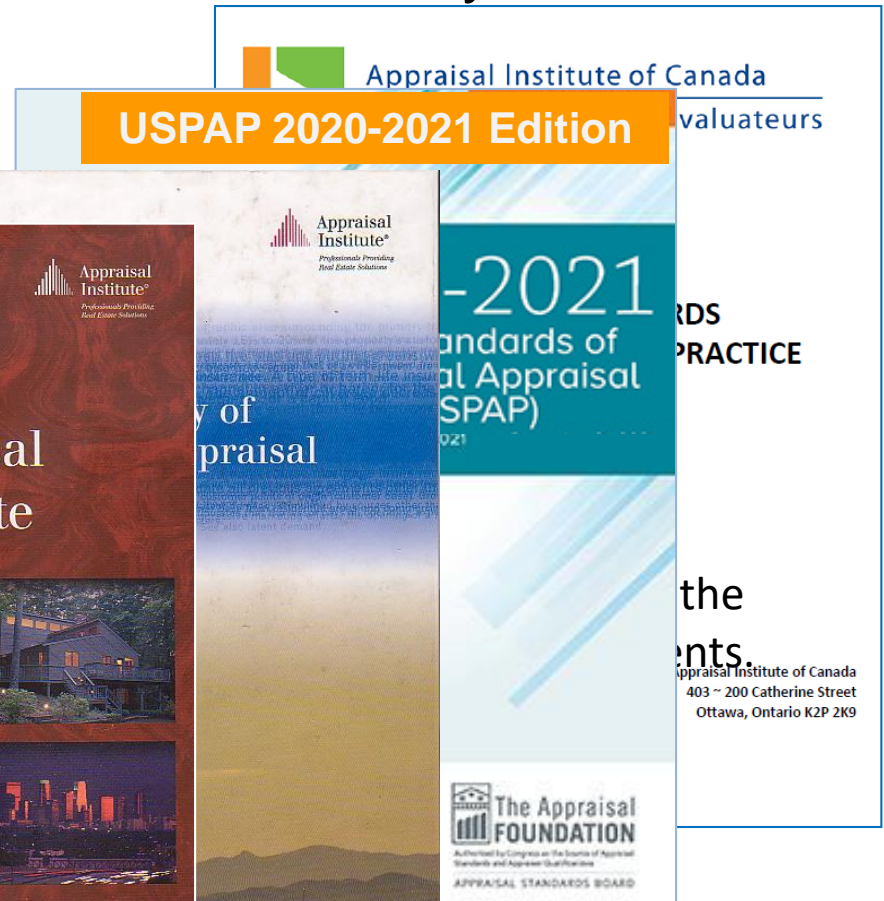
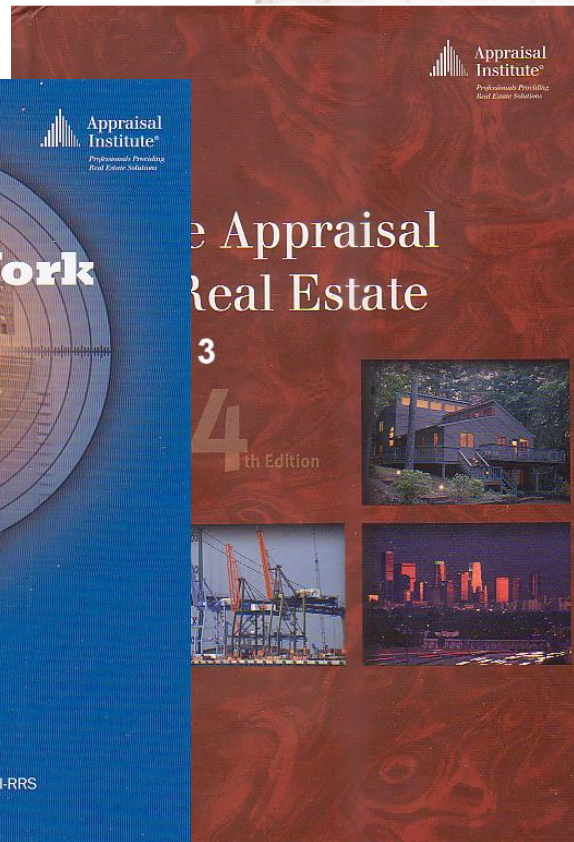
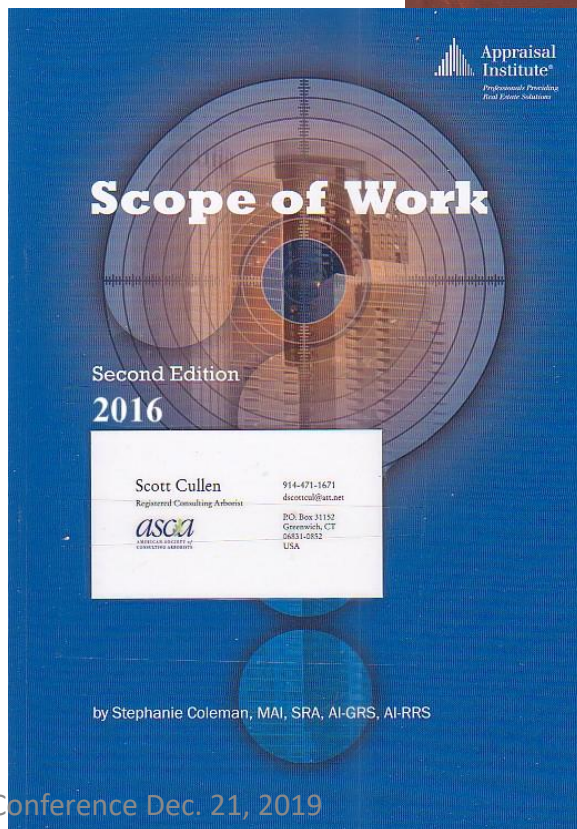
The appraisal problem is a careful and specific statement of the client's question about value and its context.



The Scope of Work Defined

The type and extent of data collection, research, and analysis.

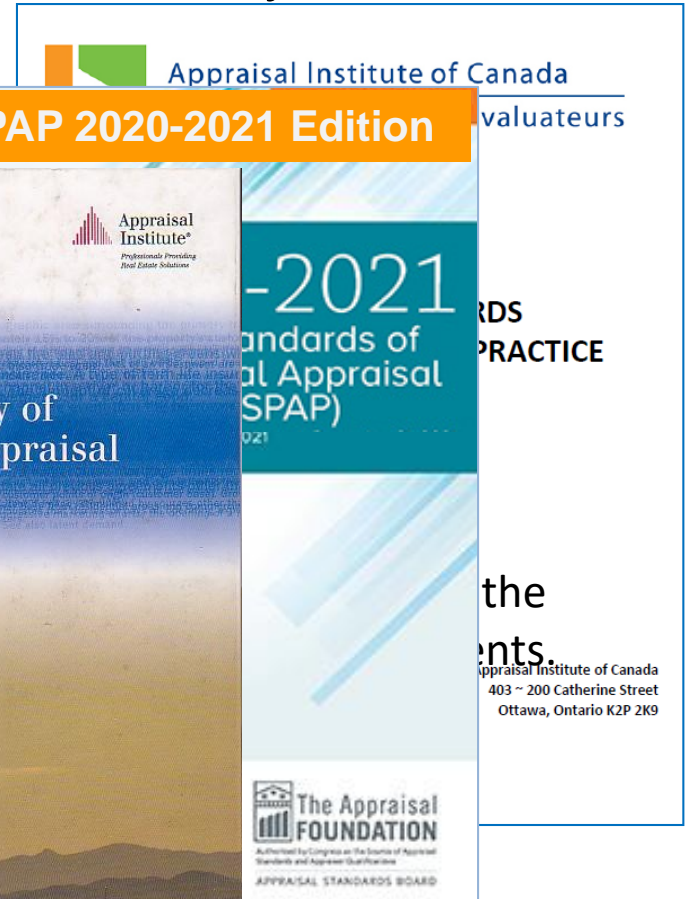
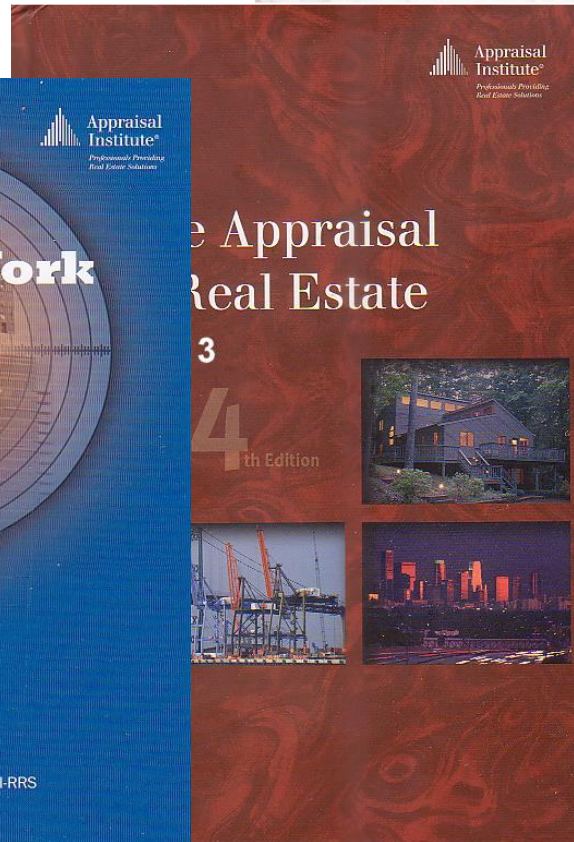
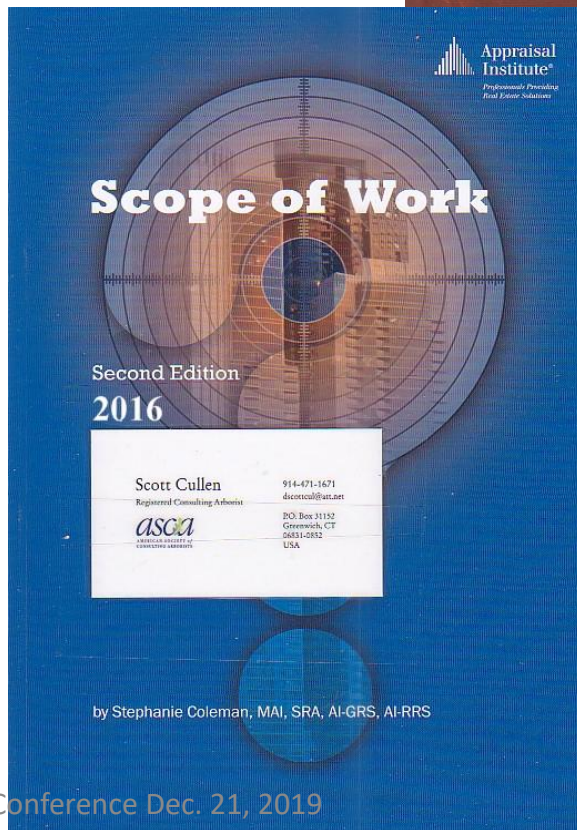
A clearly defined term.



The Assignment Defined

The service(s) provided by agreement between appraiser and client.

A clearly defined term.



The Appraisal Process

Chapter 3. p. 17. Chapter Outline.

Step 1. Define the appraisal problem.

Identify the Problem

Step 2. Define the Scope of Work.

Step 3. Collect relevant data.

Step 4. Analyze data (approaches,
methods, and techniques).

Solve the Problem
(Scope of Work)

Step 5. Reconciliation [when necessary,
see post-conference slide].

Report the Solution

Step 6. Report.

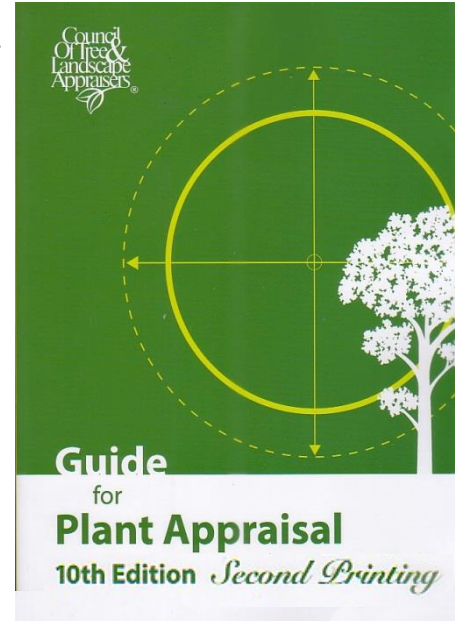
6 STEPS

Elements of the Appraisal Problem

Chapter 3. pp. 18-24, Step 1. The Appraisal Problem.

Highlights. I won't go over everything you can read in the *10th Edition*.

I will focus on why identification of the appraisal problem is the best and most important part of the *10th Edition*.

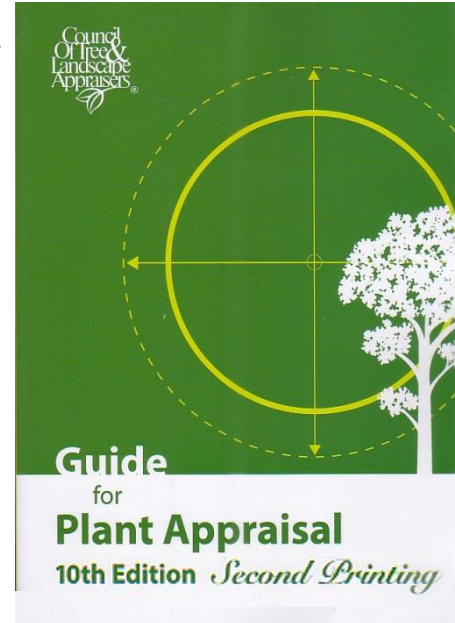


Elements of the Appraisal Problem

Chapter 3. pp. 18-24, Step 1. The Appraisal Problem.

- a) Client and intended users of the appraisal.
- b) Intended use of the appraisal.
- c) Type and definition of assignment result.
- d) Effective date of the appraisal.
- e) Relevant property characteristics.
- f) Assumptions and limiting conditions.

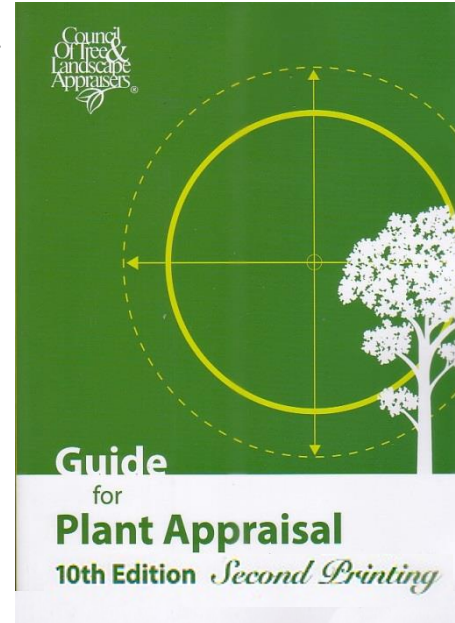
All these elements must be understood to
meaningfully solve any **appraisal problem**.



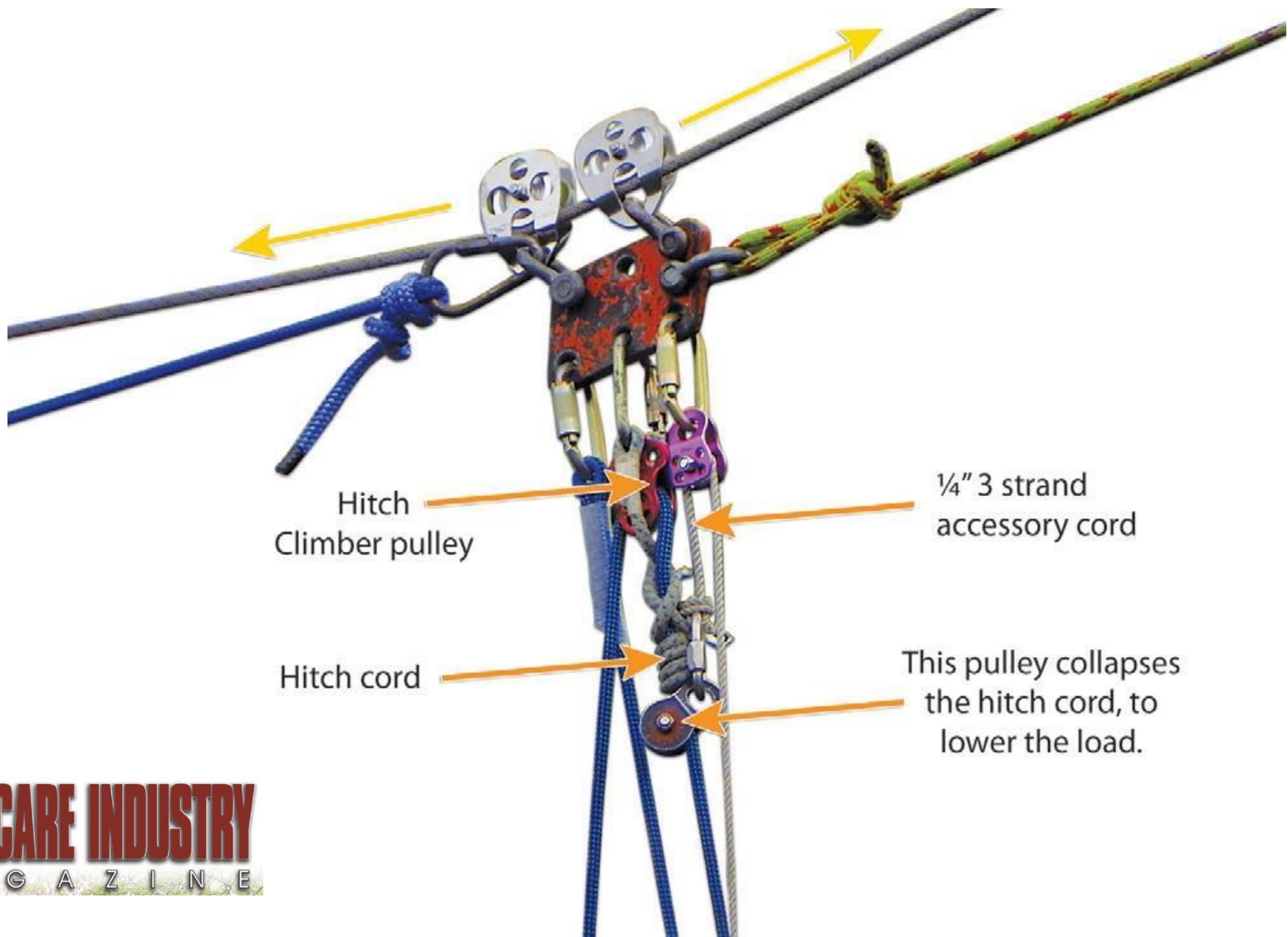
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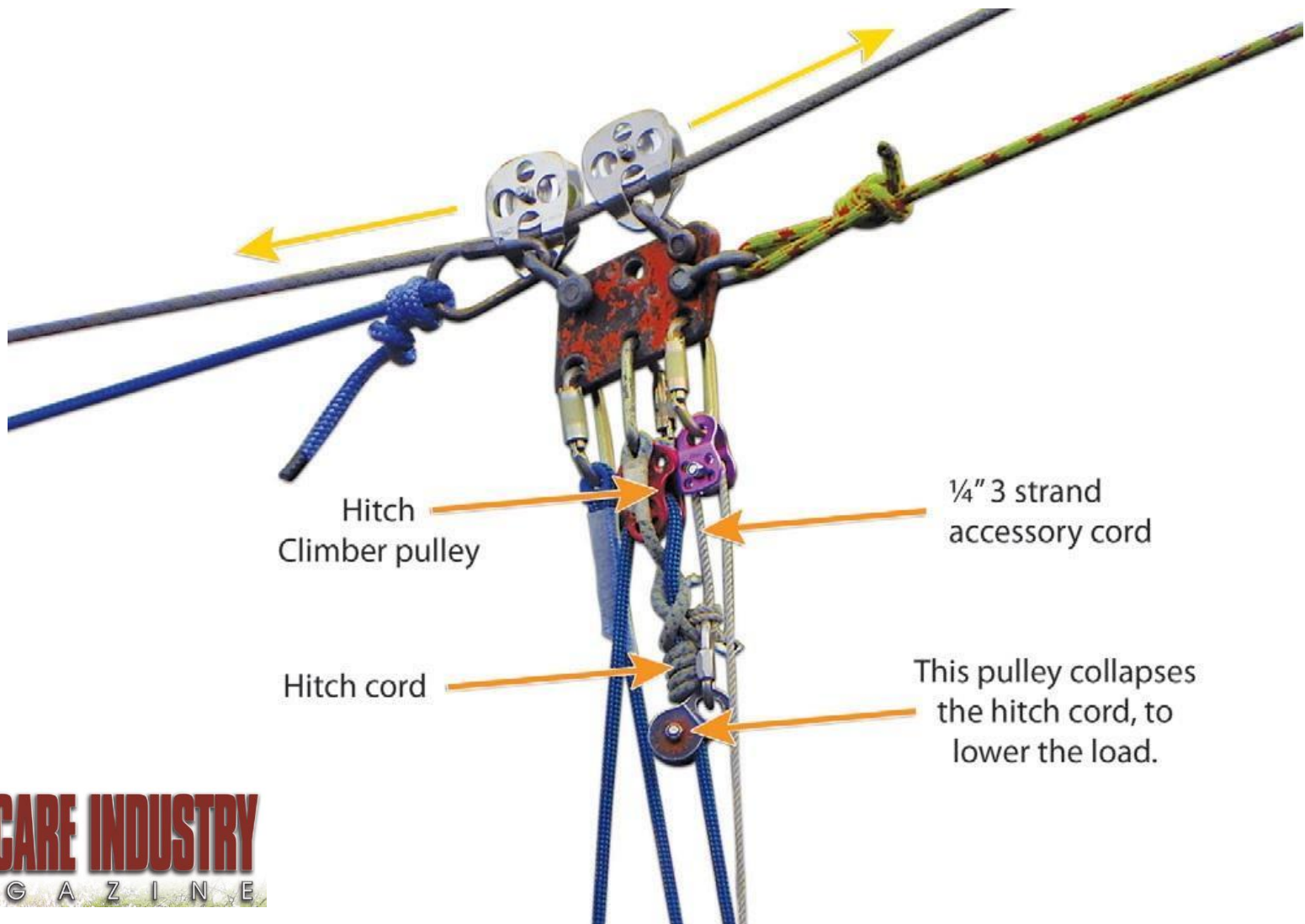
Is this too complicated for plant appraisers?



TREE CARE INDUSTRY
MAGAZINE

Hall, Norm. 2018. Using caving and mountaineering rescue techniques to transport wood. TCI Magazine XXIX(12):38-43 (December).

Post-Conference Dec. 21, 2019

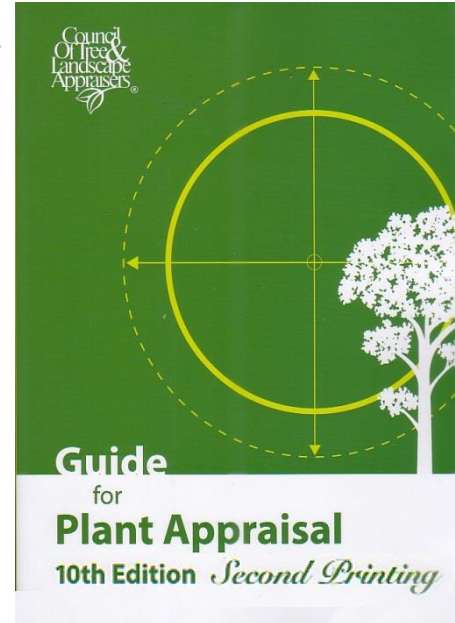


If arborists can manage this complexity, they can manage the complexity of the appraisal problem.

Elements of the Appraisal Problem

Chapter 3. pp. 18-24, Step 1. The Appraisal Problem.

- a) Client and intended users of the appraisal.
- b) Intended use of the appraisal.
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- d) Effective date of the appraisal.
- e) Relevant property characteristics.
- f) Assumptions and limiting conditions.



Not too complicated.

Understanding The Appraisal Problem

What is appraisal, really?

Every appraisal is an answer to a question or an aid to a decision.

Appraisal is problem solving.

So we **MUST** understand what the problem is: that is, what the question is, or what decision needs to be made.

Understanding Elements of the Appraisal Problem

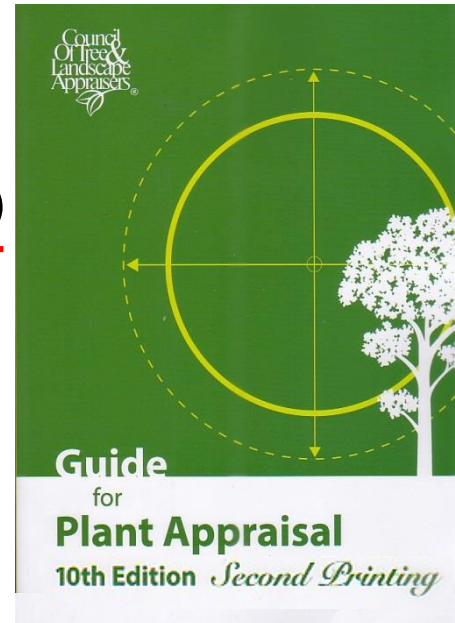
a) Client and intended users of the appraisal.

The client hires you (p.19).
[Usually who pays you.]

WHO

The appraiser owes a **duty of care** to the client (p.19).

Duty of care: an obligation to perform to reasonable standards; to meet the requirements of the **assignment** (Glossary).



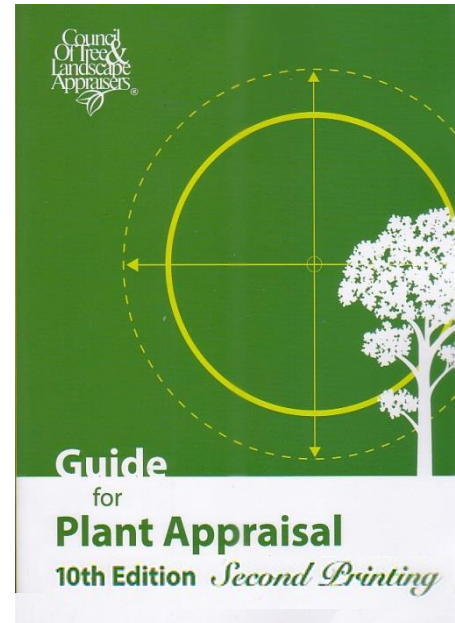
Understanding Elements of the Appraisal Problem

a) Client and intended users of the appraisal.

An intended user is a person or entity who will use the information in the appraisal (p.19).

The client is always an intended user (p.19).

Other intended users might be an attorney or law firm, municipality, neighbor, other party (p.19), a property owner, or a co-party.



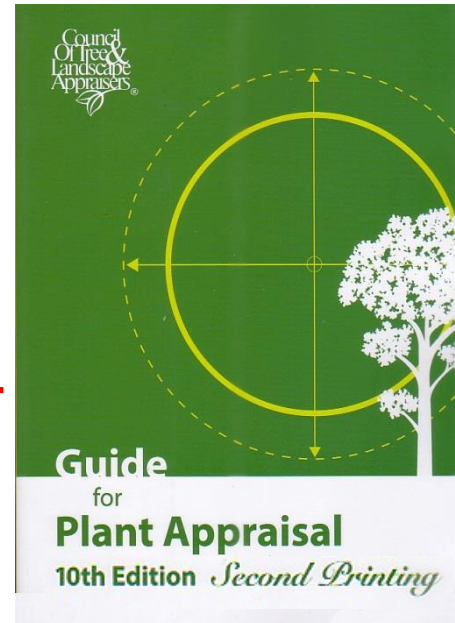
Understanding Elements of the Appraisal Problem

b) The intended use of the appraisal.

The intended use answers the question: why does the client need the appraisal? (p.19).

WHY

Understanding the intended use...is critical to identifying and defining the appraisal approach (p.19). [methods and techniques, in fact, the entire **Scope of Work**].



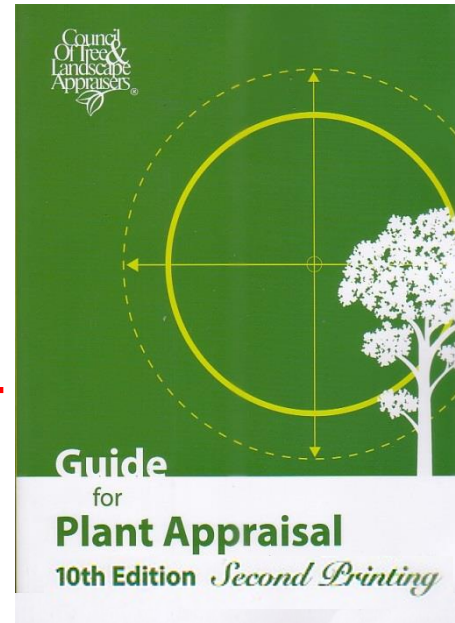
Understanding Elements of the Appraisal Problem

b) The intended use of the appraisal.

The credibility of an appraisal is always judged or measured in terms of the intended use of the appraisal (p.19).

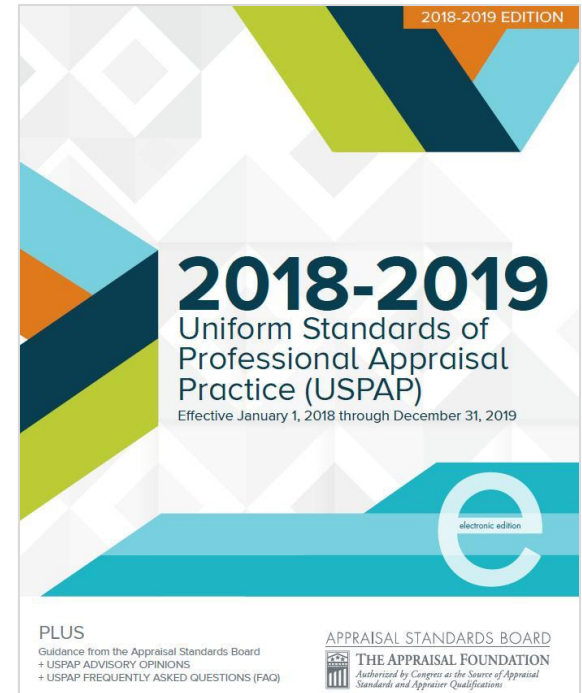
WHY

Credible is believable, trustworthy, and/or supported by relevant data and sound analyses. (p.109).



Understanding Elements of the Appraisal Problem

b) The intended use of the appraisal.



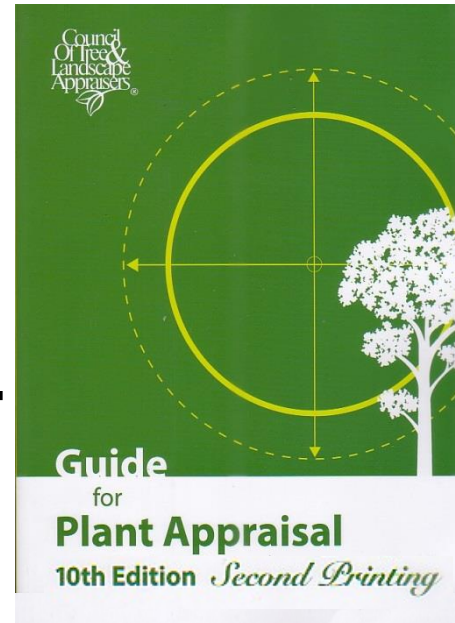
Credible: Worthy of belief. Comment: credible assignment results require support, by relevant evidence and logic, to the degree necessary for the intended use. (USPAP 2018-2019).

Understanding Elements of the Appraisal Problem

c) The **type** and definition of assignment result.

Once the intended use of the appraisal is determined, the appropriate and relevant assignment result can be identified (p.20).

WHAT



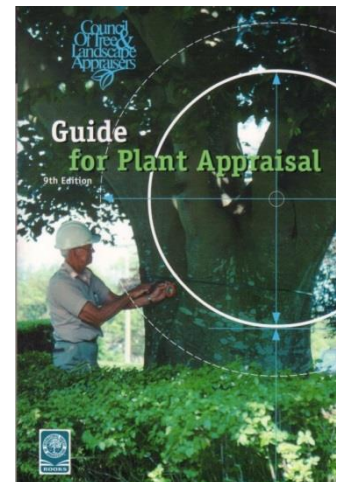
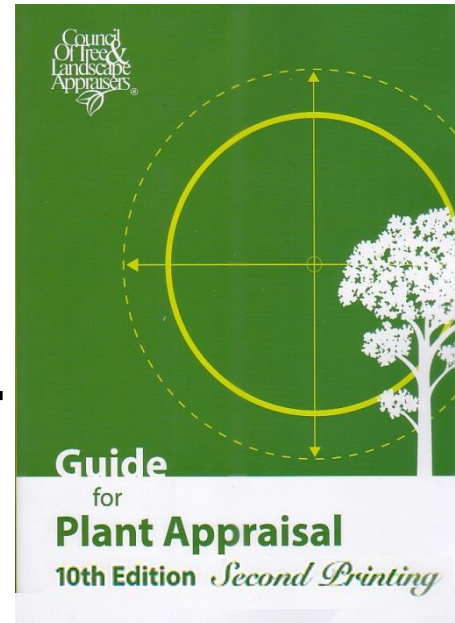
Understanding Elements of the Appraisal Problem

c) The **type** and definition of assignment result.

Once the intended use of the appraisal is determined, the appropriate and relevant assignment result can be identified (10th p.20).

WHAT

(9th p.19) ...the type of value sought must be defined at the outset.



Understanding Elements of the Appraisal Problem

c) The **type** and definition of assignment result.

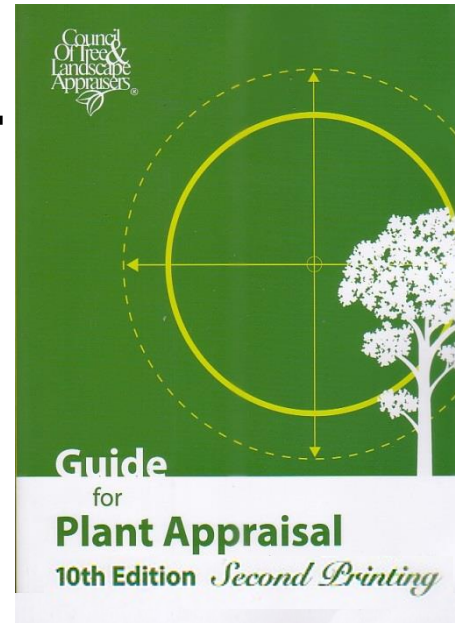
The end product of the appraisal process is an assignment result (p.7).

WHAT

An appraiser's opinions and conclusions developed specific to an assignment (p.7, Glossary).

An opinion or estimate, not a fact (p.7).

A cost or a value (p.8). The assignment result will always be a cost or a value (p.20). [IOW monetary]

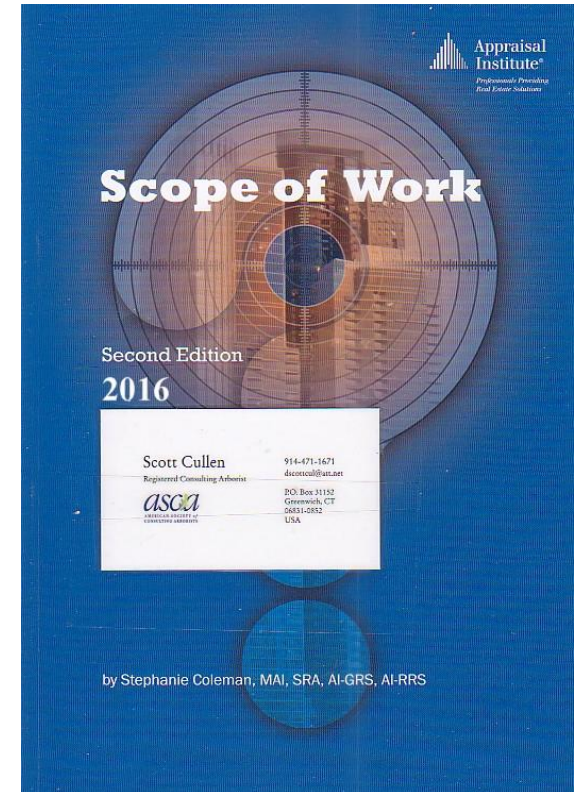


Understanding Elements of the Appraisal Problem

c) The **type** and definition of assignment result.

Once the intended use of the appraisal is determined, the appropriate and relevant assignment result can be identified (*10th Ed.* p.20).

Keep in mind that the valuer does not decide which type of value [or cost] will apply; he or she merely identifies the type needed, given the nature of the client's problem (p.41)



**Tree Appraisal:
Understanding the Appraisal
Problem, Scope of Work, and
Assignment**

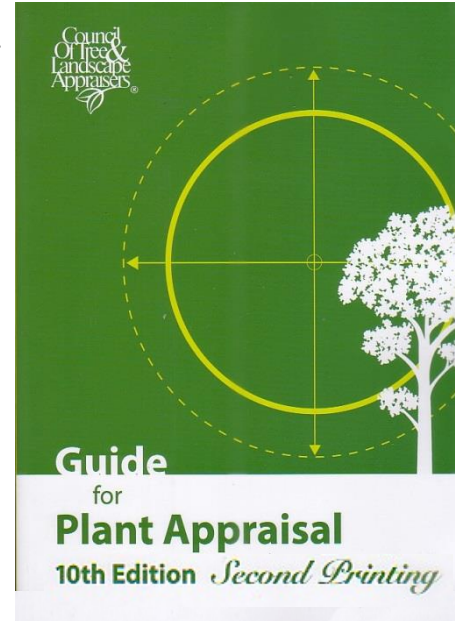
By Scott Cullen, RCA #348

Elements of the Appraisal Problem

Chapter 3. pp. 18-24, Step 1. The Appraisal Problem.

- a) Client and intended users of the appraisal. **WHO**
- b) Intended use of the appraisal. **WHY**
- c) Type and definition of assignment result. **WHAT**

See also 10TH, p.18, Table 3.1



Who wants to know and why?*

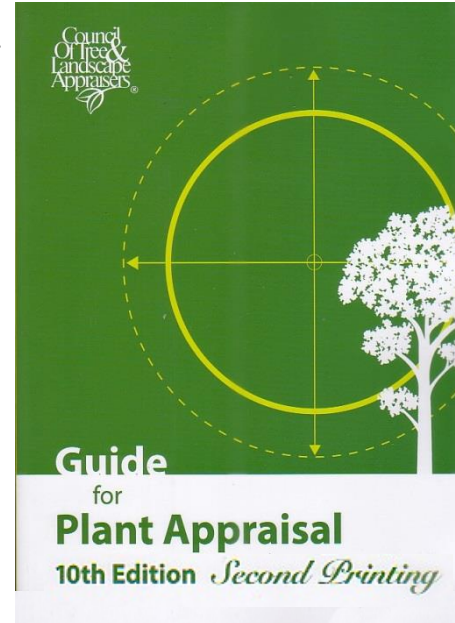
*(Azjen and Peterson 1988)

post-conference slide for complete citation

Elements of the Appraisal Problem

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- c) Type and definition of assignment result.
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- e) Relevant property characteristics.
- f) Assumptions and limiting conditions.



Save your questions about d), e), and f).

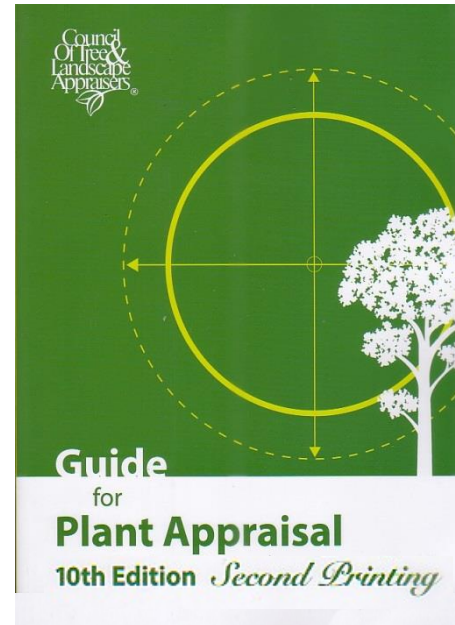
Why the Appraisal Problem Is Most Important Part of *10th*

First, a well defined **appraisal problem** is the key to a meaningful appraisal.

It was the most necessary part of a new edition of the *Guide*.

~~Much more than a new methods structure.~~

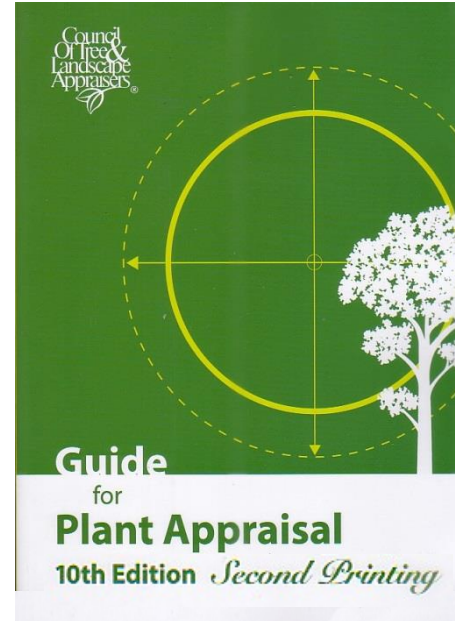
~~Much more than a new depreciation scheme.~~



Why the Appraisal Problem Is Most Important Part of *10th*

First, a well defined **appraisal problem** is the key to a meaningful appraisal.

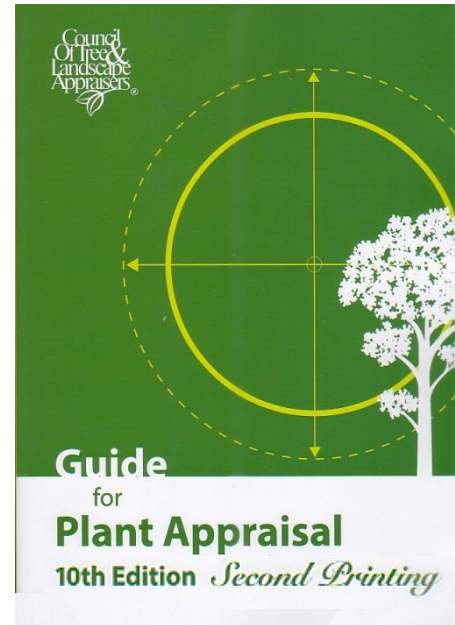
The culture of plant appraisal should be about identifying and solving the **appraisal problem**.



Why the Appraisal Problem Is Most Important Part of 10th

Second, a well defined **appraisal problem** enables you to clearly describe your client's appraisal problem.

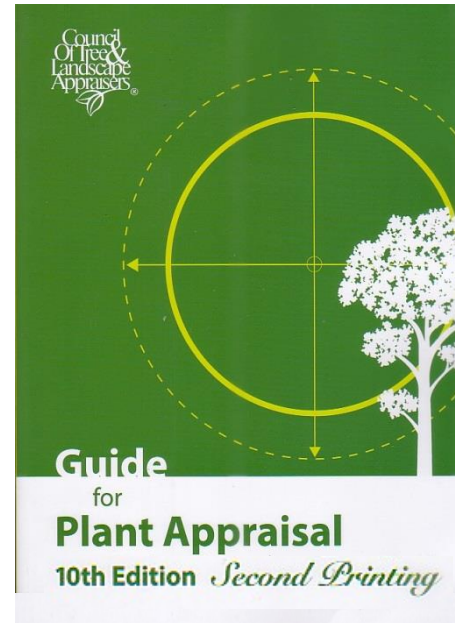
The appraisal problem is a careful and specific statement of the client's question about value and its context.



RPAC = Regional Plant Appraisal Committee

Why the Appraisal Problem Is Most Important Part of *10th*

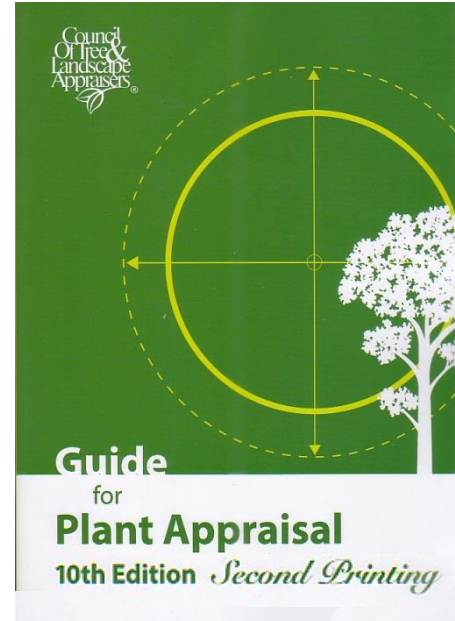
Third, a well defined **appraisal problem** enables you to defend your solution to your client's **appraisal problem**.



Why the Appraisal Problem Is Most Important Part of *10th*

The *10th* Edition

can be read,
has been read,
is being read, and
will continue to be read...



...to impose normative or preferred
assignment results on your client's
appraisal problem.

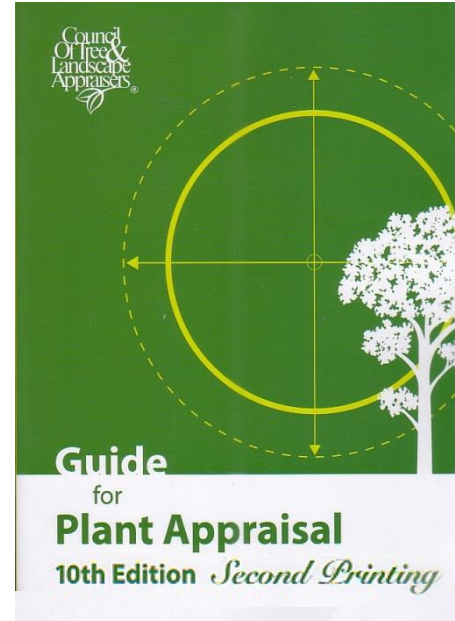
This slide speaks to how *10th* is being used, **not** to CTLA's goals and intentions.

Why the Appraisal Problem Is Most Important Part of *10th*

The *10th Edition*

can be read,
has been read,
is being read, and
will continue to be read...

...to put some types of assignment result
on firm ground and other types of
assignment result on thin ice.



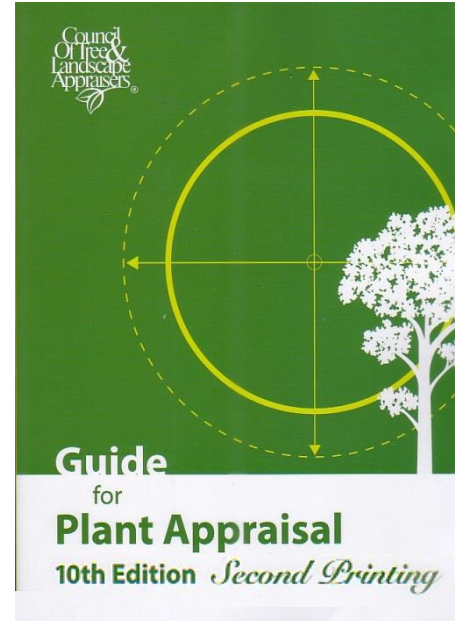
This slide speaks to how *10th* is being used, **not** to CTLA's goals and intentions.

Why the Appraisal Problem Is Most Important Part of *10th*

The *10th Edition*

can be read,
has been read,
is being read, and
will continue to be read...

...to put some problems on firm ground
and other problems on thin ice. IOW...

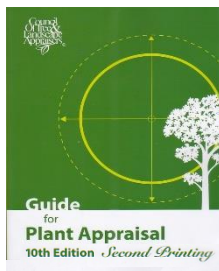


This slide speaks to how *10th* is being used, **not** to CTLA's goals and intentions.

Why the Appraisal Problem Is Most Important Part of 10th

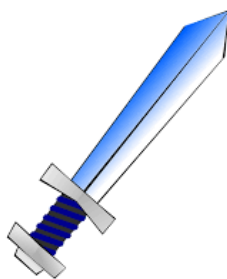
The 10th Edition

can be read,
has been read,
is being read, and
will continue to be read...



...to rig the game.

10th Edition is being
used as a weapon.



“Weapon. An instrument used or designed to be used to injure or kill...” (*Blacks Law Dictionary, 10th Edition*)

This slide speaks to how 10th is being used, **not** to CTLA’s goals and intentions.

10th is being used as an appraisal killer.

10th is being used not merely to challenge or review the adequacy, quality, or relevance of an opposing appraisal’s data or analyses, but rather to kill the opposing appraisal by suggesting that 10th requires certain types of assignment result and precludes or discredits other types of assignment result, data, or methodology.

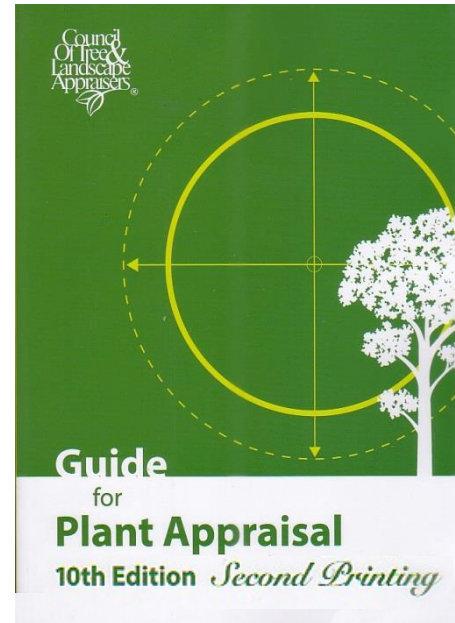
10th is being wielded in a manner that is inconsistent with Step 1 of the appraisal process and the appraiser’s Duty of Care to clients.

Romkey v. Osborne (following) illustrates such use of 10th, and one court’s rejection of such use. 10th has been used similarly in other cases yet to be decided. Tree appraisers must remain prepared to effectively defend against such use of 10th.

Why the Appraisal Problem Is Most Important Part of 10th

The 10th Edition

can be read,
has been read,
is being read, and
will continue to be read...



...to exclude otherwise admissible
evidence by making it professionally
improper to even develop it.



This slide speaks to how 10th is being used, **not** to CTLA's goals and intentions.

Why the Appraisal Problem Is Most Important Part of *10th*

The *10th Edition*

can be read,

has been read.

is being read, and

will continue to be read...

This is not interpretation. Not opinion. Not speculation.

This is fact.

Why the Appraisal Problem Is Most Important Part of 10th

SUPREME COURT OF NOVA SCOTIA

Citation: *Romkey v. Osborne*, 2019 NSSC 56

Defense Counsel: The 9th and 10th Editions required the Plaintiff's expert's assignment results to be related to REMV [76].

Plaintiff's Expert: REMV was irrelevant to my assignment [76].

See text box on Slide 64.

Read this case (Handout 5) and Dr. Dunster's "Assignment" article (Handout 3).

Why the Appraisal Problem Is Most Important Part of 10th

SUPREME COURT OF NOVA SCOTIA

Citation: *Romkey v. Osborne*, 2019 NSSC 56

The Judge. [Plaintiff's expert] was asked... to assess the cost to replace the trees... He was not asked to determine the resulting diminution in property value... In his assessment, which I accept, [REMV was] not relevant to the task he was asked to undertake.

Credible: Worthy of belief... credible assignment results require support, by relevant evidence and logic, to the degree necessary for the intended use. (USPAP 2018-2019)

Why the Appraisal Problem Is Most Important Part of 10th

SUPREME COURT OF NOVA SCOTIA

Citation: *Romkey v. Osborne*, 2019 NSSC 56

The Judge. [Plaintiff's expert] was asked... to assess the cost to replace the trees... He was not asked to determine the resulting diminution in property value... In his assessment, which I accept, [REMV was] not relevant to the task he was asked to undertake. I find that [his] appraised value is a reliable estimate of the cost to [Plaintiff] to replace the trees and return their property to its pre-trespass condition [154].

Whether replacement value is the appropriate measure of damages is a separate question [154; **reading between the lines, the COURT answers the question**].



Why the Appraisal Problem Is Most Important Part of 10th

SUPREME COURT OF NOVA SCOTIA

Citation: *Romkey v. Osborne*, 2019 NSSC 56

The Judge. [in this case] the subjective value the owner assigns to the property is a relevant consideration when deciding on the quantum [amount] of damages for trespass [156].

Why the Appraisal Problem Is Most Important Part of 10th

SUPREME COURT OF NOVA SCOTIA

Citation: *Romkey v. Osborne*, 2019 NSSC 56

The Judge. The subjective **value the owner assigns** to the property... [156].

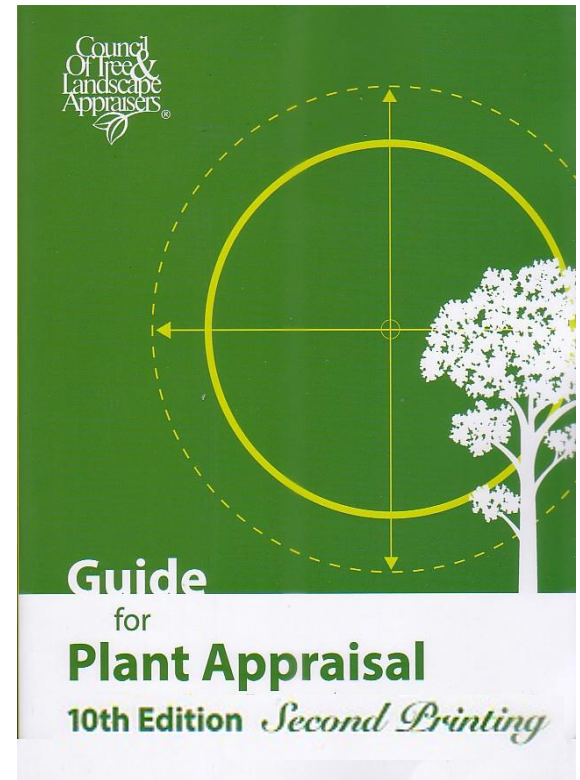


Value to whom?
Asked.
Not answered.

The Judge. [citing another case] in determining the quantum of damages for trespass, each case must be decided on the basis of what is reasonable on the particular facts being considered... [155].

Why the Appraisal Problem Is Most Important Part of 10th

To summarize...

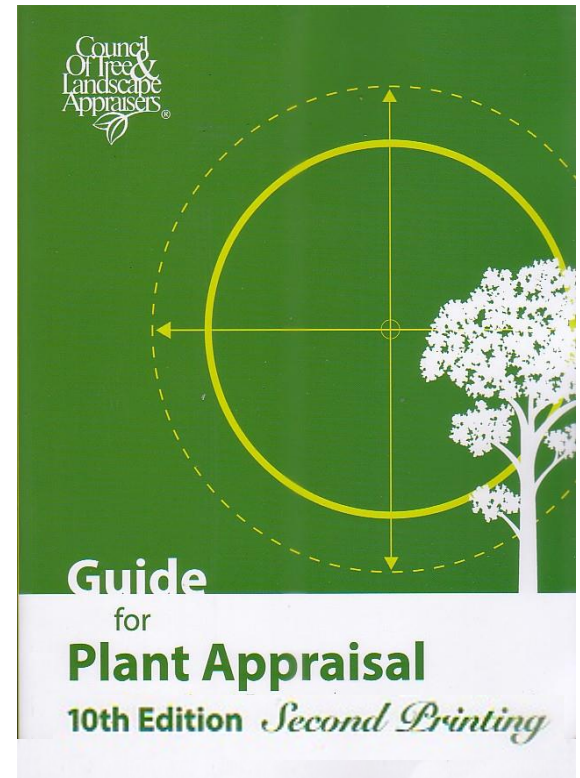


Why the Appraisal Problem Is Most Important Part of 10th

First, a well defined **appraisal problem** is the key to a meaningful appraisal.

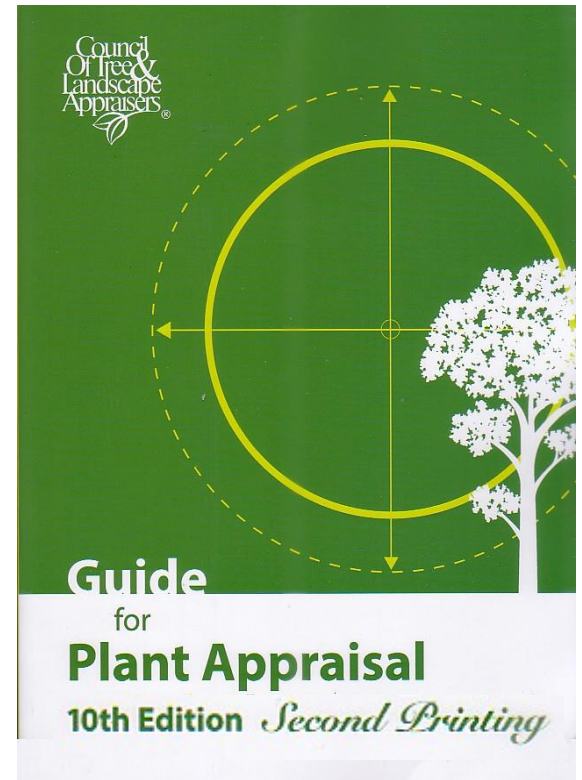
Second, a well defined **appraisal problem** enables you to describe your client's appraisal problem.

Third, a well defined **appraisal problem** enables you to defend your solution to your client's **appraisal problem**.



Why the Appraisal Problem Is Most Important Part of 10th

A well defined **appraisal** problem is your friend.

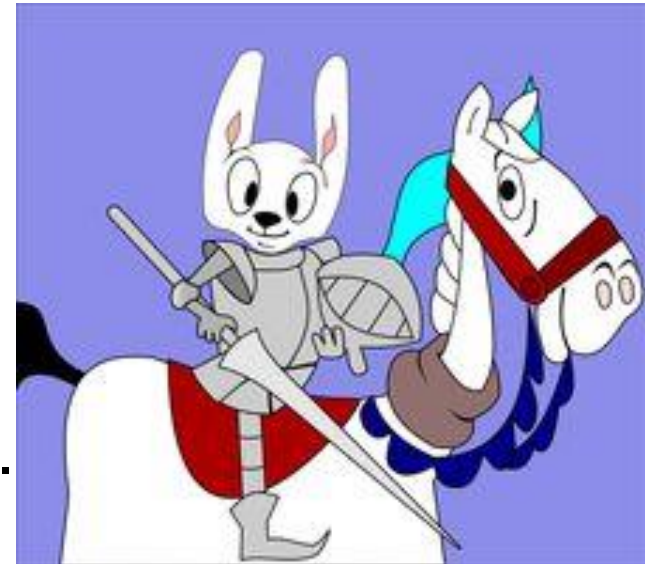


Why the Appraisal Problem Is Most Important Part of *10th*

A well defined **appraisal problem** is your friend.

A well defined **appraisal problem** is your armor and your weapon to defend your solution to your client's appraisal problem.

See text box on Slide 64.



Why the Appraisal Problem Is Most Important Part of *10th*

Plant appraisers should not have to fight the *Guide*.

But the way the *10th Edition* is being used in practice, you must make a decision: fall in line, or fight.



See text box on Slide 64.

The appraiser owes a **duty of care** to the client (p.19)... an obligation...to meet the requirements of the **assignment** (Glossary).

If you just fall in line, are you meeting your duty of care?

Why the Appraisal Problem Is Most Important Part of *10th*

Bonus question: Where did Crusader Rabbit live?

A well defined **appraisal problem** is your armor and your weapon to defend your solution to your client's appraisal problem.



Understanding The Appraisal Problem Is Simple

Every appraisal is an answer to a question or an aid to a decision.

The appraisal problem is a careful and specific statement of the client's question about value and its context.

Identify the problem.

Solve the problem.

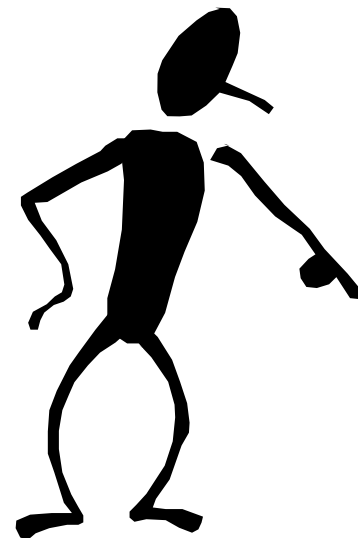
Report the solution.



The Appraisal Problem Is the Most Important Part of *10th*



Q & A



The Appraisal Problem Is the Most Important Part of *10th*



Q & A

Listen to the moderator!

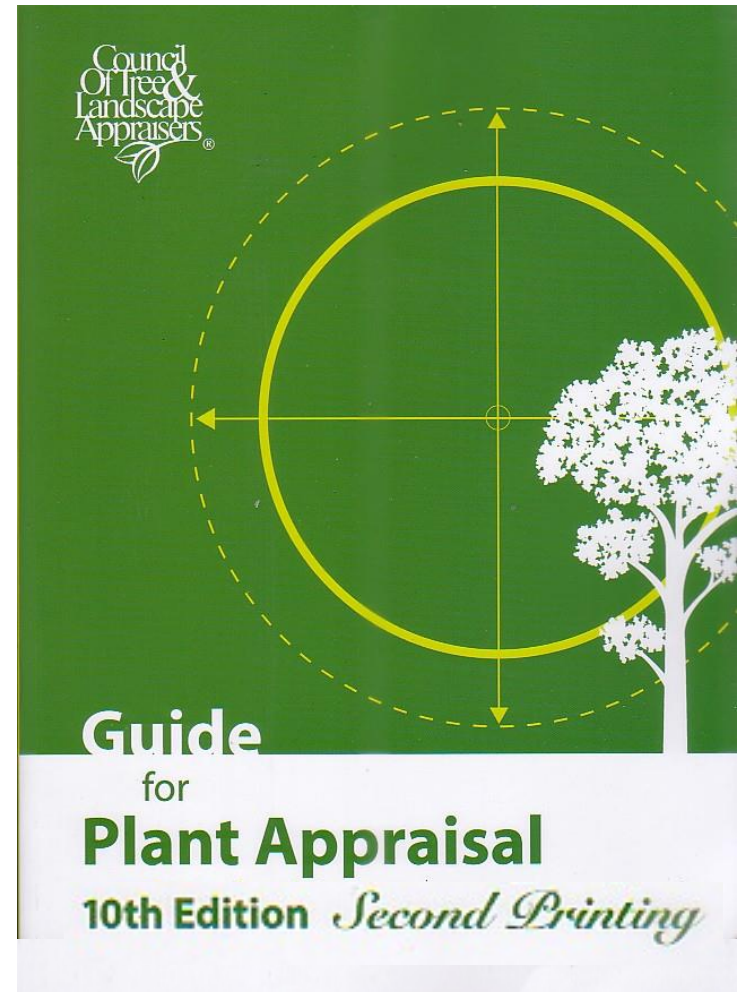


Understanding The Appraisal Problem

Today's Message:

Identification of the **appraisal problem** is the best part of *10th Edition* and its most important contribution.

It's the client's **appraisal problem**.





Completed TPAQ?

Was identification of the **appraisal problem** well addressed in your TPAQ class?

What Next?

Page 14

TREE SERVICE CANADA SPRING 2019

TREES & THE LAW

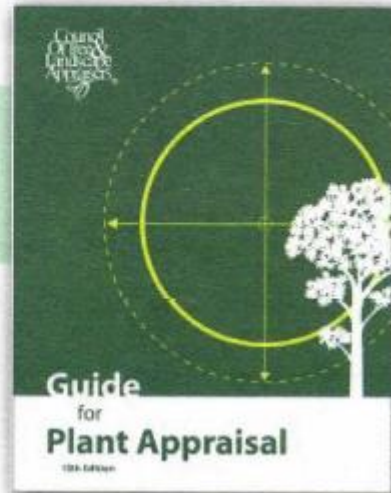
BY JULIAN DUNSTER



BOOK REVIEW

Guide for Plant Appraisal, 10th Edition

CTLA, 2018. *Guide for Plant Appraisal, 10th Edition*. Champaign IL: International Society of Arboriculture.
ISBN 978-1-943378-02-9.



What Next?

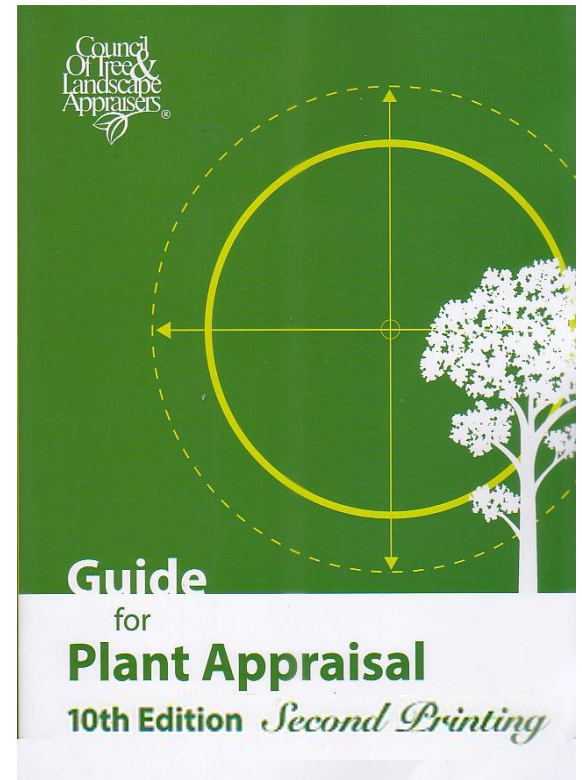
What Next?

The 10th Edition

will continue to be read...

...to exclude otherwise admissible evidence by making it professionally improper to even develop it.

Will this change all by itself?



10th Ed. - What Next?

Arboricultural Consultant 26(3)		1993
1993 Conference Program... Portland, ME		
Continued from page 3		Sunday, October 3
12:00	<p>Luncheon</p> <p><u>Tree Appraisal - The Eighth Edition & Beyond</u></p> <ul style="list-style-type: none">> The Status & Role of ASCA's Tree Appraisal Workshop<ul style="list-style-type: none">- A brief report by Exec. Director, John Duke> The Trunk Formula Method Revisited<ul style="list-style-type: none">- A plain English explanation developed over six workshops and designed to address misunderstandings or reservations about the philosophy behind and use of the formula> Regional Costs<ul style="list-style-type: none">- A comparison of the cost factors and methods actually adopted to date by ISA Chapters or other regional groups. Representatives from each region will tell you how their region has implemented the Eighth Edition. This will be eye-opening!	<ul style="list-style-type: none">> Technical Issues<ul style="list-style-type: none">- An advanced discussion of issues involved in determining Location, Condition and Species factors which are not addressed specifically in the "Guide"- When is a tree appraiser subject to licensing as a real estate appraiser under state/federal laws?- When is appraising only a representative sample of the total tree population legitimate?> Landscape Insurance<ul style="list-style-type: none">- How close to reality is this concept?- How big will its impact be on the demand for qualified tree and landscape appraisers?
2:45	<p>Break</p> <ul style="list-style-type: none">> Applying the CTLA Method to Special Situations<ul style="list-style-type: none">- Forest Fires- Nurseries- Animal Damage- Historic Trees- Urban Forest- Condemnation & Partial Takings	

Tree Appraisal – The 8th Edition & Beyond

Handouts

- 1 **Tree Appraisal: Understanding the Appraisal Problem, Scope of Work, and Assignment** (Scott Cullen)
- 2 **BOOK REVIEW. *Guide for Plant Appraisal, 10th Edition***
(Dr. Julian Dunster)
- 3 **Tree Appraisal: The Assignment Is Critical** (Dr. Julian Dunster)
- 4 **Trees, Real Estate, and Market Value: The Real Deal**
(Scott Cullen)
- 5 **Romkey v Osborne, 2019 NSSC 56, SUPREME COURT OF NOVA SCOTIA**

Preceding were conference slides including hidden
□ slides.

Following are post-conference slides to clarify
questions or provide additional information.

The Appraisal Process

Chapter 3. p. 17. Chapter Outline.

Step 1. Define the appraisal problem.

Identify the Problem

Step 2. Define the Scope of Work.

Step 3. Collect relevant data.

Solve the Problem
(Scope of Work)

Step 4. Analyze data (approaches, methods, and techniques).

Step 5. Reconciliation [when necessary]

Step 6. Report.

Report the Solution

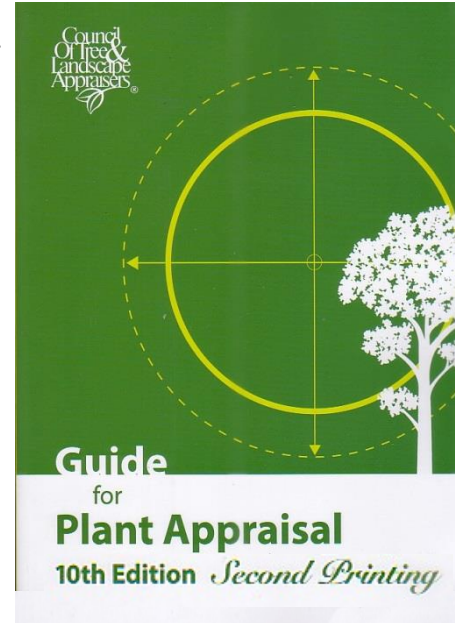
10th p.26: “Reconciliation, when necessary [emphasis added], is the final step in developing the assignment result.”

Elements of the Appraisal Problem

Chapter 3. pp. 18-24, Step 1. The Appraisal Problem.

- a) Client and intended users of the appraisal. **WHO**
- b) Intended use of the appraisal. **WHY**
- c) Type and definition of assignment result. **WHAT**

Who wants to know and why?*



*Azjen, I. and Peterson, G.L. 1988. *Contingent value measurement: the price of everything and the value of nothing*, pp. 65–76 in Peterson, G.L. Driver, B.L. and Gregory, R. (eds.), *Amenity Resource Valuation: Integrating Economics with Other Disciplines*, Venture Publishing, State College, PA. 260pp.

The Ethical Appraisal

How do you know if your work is ethical and free from advocacy? “My conclusions and opinions would be the same regardless of who the client is.”

This is a common test. If the question is “what does this log weigh?” or “what is the DBH of this tree?” or “is this living tree a maple or an oak?” the answer should not vary beyond normal limits. Does it clearly apply to tree appraisal opinions?

Step 1(C) requires the appraiser to identify the type of assignment result in the client’s appraisal problem. If two competent and ethical appraisers, hired by two different clients, solve different appraisal problems for two different types of assignment result, their results would often vary. The same appraiser would often develop varying results for Plaintiff or Defendant if the type of assignment result varies for the same tree(s).

Even if the two appraisers solve for the same type of assignment result, their opinions can vary based on their interpretations of fact. ASCA’s *Guide to a Professional Consulting Practice* is clear: “Because professionals can reach differing results, a consultant should be prepared to explain and justify her results when faced with a divergent opinion from another professional.”