



## Filing Receipt

**Received - 2022-11-03 01:37:17 PM**

**Control Number - 50404**

**ItemNumber - 114**

**DOCKET NO. 50404**

<b>PETITION OF STERLING DEASON</b>	<b>§</b>	<b>PUBLIC UTILITY COMMISSION</b>
<b>O'DONNELL AND DARWIN DEASON,</b>	<b>§</b>	
<b>CO-TRUSTEES OF THE STERLING</b>	<b>§</b>	<b>OF TEXAS</b>
<b>DEASON O'DONNELL DD 2012</b>	<b>§</b>	
<b>TRUST UNDER AGREEMENT OF</b>	<b>§</b>	
<b>THE DD 2014-B GRANTOR</b>	<b>§</b>	
<b>RETAINED ANNUITY TRUST TO</b>	<b>§</b>	
<b>AMEND MARILEE SPECIAL UTILITY</b>	<b>§</b>	
<b>DISTRICT'S CERTIFICATE OF</b>	<b>§</b>	
<b>CONVENIENCE AND NECESSITY IN</b>	<b>§</b>	
<b>COLLIN COUNTY BY EXPEDITED</b>	<b>§</b>	
<b>RELEASE</b>	<b>§</b>	

**COMMISSION STAFF'S SUBMISSION OF THIRD-PARTY APPRAISAL REPORT**

Commission Staff respectfully submits the third-party appraisal report in this matter attached to this filing.

Dated: November 3, 2022

Respectfully submitted,

**PUBLIC UTILITY COMMISSION OF TEXAS  
LEGAL DIVISION**

Keith Rogas  
Division Director

Marisa Lopez Wagley  
Managing Attorney

/s/ Phillip Lehmann  
Phillip Lehmann  
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**DOCKET NO. 50404**

**CERTIFICATE OF SERVICE**

I certify that, unless otherwise ordered by the presiding officer, notice of the filing of this document was provided to all parties of record via electronic mail on November 3, 2022, in accordance with the Order Suspending Rules, issued in Project No. 50664.

/s/ Phillip Lehmann  
Phillip Lehmann

**REPORT OF COMPENSATION FOR  
DECERTICATION OF PROPERTY  
WITHIN CCN 10150  
(MARILEE SPECIAL UTILITY DISTRICT)  
TEXAS PUC DOCKET 50404**

PREPARED FOR  
MR. PHILLIP LEHMANN  
ATTORNEY, LEGAL DIVISION  
PUBLIC UTILITY COMMISSION OF TEXAS



# UTILITY

VALUATION EXPERTS

*Real Estate Appraisers & Consultants*  
313 N. Chicago Street, Suite 101 Joliet, Illinois 60432  
(888) 416-3797



Joseph E. Batis, MAI, AI-GRS, R/W-AC

November 3, 2022

Mr. Phillip Lehmann  
Attorney, Legal Division  
Public Utility Commission of Texas  
1701 N. Congress Avenue  
Austin, Texas 78711-3326

Re: ***Compensation Report for Expedited Release  
Decertification of Part of CCN 10150  
Texas PUC Docket 50404***

Dear Mr. Lehmann:

Attached is the compensation report prepared by Utility Valuation Experts, Inc., regarding the decertification of part of CCN 10150 (PUC Docket 50404). Please feel free to contact the undersigned should you have any questions regarding the assignment.

Sincerely,

UTILITY VALUATION EXPERTS, INC.

Joseph E. Batis, MAI, AI-GRS, R/W-AC

State Certification in  
Illinois | Missouri | Tennessee | Virginia | Texas | Arizona | Maryland | New Hampshire

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**ADDENDA**

Qualifications of the Appraiser

### ***Case Background***

Sterling Deason O'Donnell and Darwin Deason, co-trustees of the Sterling Deason O'Donnell DD 2012 Trust under agreement of the DD 2014-B Grantor Retained Annuity Trust ("Petitioner") filed a petition with the Public Utility Commission of Texas ("PUC") for an expedited release from the Marilee Special Utility District ("MSUD"), Certificate of Convenience and Necessity ("CCN") No. 10150. The petition (Control Number 50404-1) was in accordance with Texas Water Code Section 13.2541 and 16 Texas Administrative Code Section 24.245. The Petitioner filed an amended petition (Control Number 50404-45) on April 27, 2021.

Pursuant to the rules of the applicable Section of the Texas Water Code, the two parties, the Petitioner and MSUD, submitted to the PUC their valuation experts' opinion reports with their respective opinions of appropriate compensation for the expedited release and decertification of a portion of CCN 10150 per the Petitioner's application.

The Petitioner retained Willdan Financial Services ("Willdan"), who in turn prepared an opinion report ("Willdan report") dated May 9, 2022. The Willdan report is addressed to the law firm of COATS ROSE, P.C. (Austin, Texas).<sup>1</sup>

MSUD retained NewGen Strategies & Solutions ("NewGen"), who in turn prepared an opinion report ("NewGen report") dated May 5, 2022. The NewGen report is addressed to Mustang Special Utility District (Celina, Texas).<sup>2</sup>

The Willdan report and NewGen report include a summary explanation of the respective opinions of their authors that result in the final conclusions noted below:

<i>Opinion of Compensation developed for Petitioner by Willdan:</i>	<u>\$ -0-</u>
<i>Opinion of Compensation developed for MSUD by NewGen:</i>	<u>\$211,485</u>

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<sup>1</sup> See Public Utility Commission of Texas, Control Number 50404, Item Number 95.

<sup>2</sup> See Public Utility Commission of Texas, Control Number 50404, Item Number 96.

Both opinion reports arrive at their conclusions by considering the following factors for just compensation as set forth in Section 13.254(g) of the Texas Water Code:

- *The value of real property owned and utilized by the retail public utility for its facilities (as determined according to the standards set forth in Chapter 21, Property Code, governing actions in eminent domain);*
- *The amount of the retail public utility's debt allocable for service to the area in question;*
- *The value of the service facilities of the retail public utility located within the area in question;*
- *The amount of any expenditures for planning, design, or construction of service facilities that are allocable to service to the area in question;*
- *The amount of the retail public utility's contractual obligations allocable to the area in question;*
- *Any demonstrated impairment of service or increase of cost to consumers of the retail public utility remaining after the decertification;*
- *The impact on future revenues lost from existing customers;*
- *Necessary and reasonable legal expenses and professional fees; and,*
- *Other relevant factors.*

### ***Purpose of the Assignment***

The purpose of this assignment is to develop an opinion of compensation for the expedited release of property from the MSUD CCN 10150.

### ***Intended Use and Intended User***

The intended users of this report include the Petitioner, MSUD, and the Public Utility Commission of Texas. The intended use of this report is to assist the parties in resolving the issue of just compensation resulting from the subject petition for decertification.



***UVE Scope of Work Details***

Pursuant to Section 13.2541(i) of the Texas Water Code, the PUC Staff appointed Utility Valuation Experts, Inc. (“UVE”) to prepare this report. Per the rules of the Texas Water Code, the determination of compensation by UVE may not be less than the lower appraisal (\$0 opined by Willdan) or more than the higher appraisal (\$211,485 opined by NewGen).

In developing its opinion, UVE has reviewed the Willdan Report and the NewGen report, reviewed the files contained in the subject PUC case docket (50404), and reviewed the applicable rules and codes pursuant to the Texas Water Code. This analysis did not include an inspection of the property contained in CCN 10150 or the property which is the subject of petition for expedited release and decertification.

Unless otherwise stated, this analysis does not include any opinions of market value of any real property rights for any property including the CCN and the property proposed for decertification in the subject petition.

***Compliance with the Uniform Standards of Professional Appraisal Practice.***

The appraisal profession adopts and adheres to the rules and requirements of the *Uniform Standards of Professional Appraisal Practice* (“USPAP”).

The JURISDICTIONAL EXCEPTION RULE of USPAP recognizes that in certain situations, applicable law or regulation may preclude compliance with any part of USPAP. In the subject case, the rules established by the Texas Water Code set forth specific guidelines for determining compensation that are not necessarily consistent with traditional valuation methodology.

For instance, the factors for consideration in determining compensation as set forth in Section 13.254(g) of the Texas Water Code are not generally considered in the typical valuation of real property rights. Therefore, this valuation assignment is completed by invoking the JURISDICTIONAL EXCEPTION RULE of USPAP.

***Relevant Assignment Dates***

The effective date of value of the UVE analysis and determination of compensation for an expedited release from MSUD as requested by the Petitioner is November 1, 2022. The date of the UVE compensation report is November 3, 2022.

### ***Determination of Compensation***

The following is a summary of the analysis and conclusions developed by UVE in forming its opinion of compensation for the subject case.

**FACTOR ONE** - *The value of real property owned and utilized by the retail public utility for its facilities (as determined according to the standards set forth in Chapter 21, Property Code, governing actions in eminent domain).*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor One.

**UVE CONCLUSION FOR FACTOR ONE: Compensation = \$0**

**FACTOR TWO** - *The amount of the retail public utility's debt allocable for service to the area in question*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was \$130,747 due for this factor.

Comments: NewGen states on Page 10 of its report the following: "Marilee SUD has issued debt to fund the planning, design, and construction of facilities to provide water service to existing and future customers within its CCN." Page 17 of the NewGen report lists the remaining debt obligations that total approximately \$1,590,027. The NewGen report does not include an explanation for how much of the original debt (or remaining debt) is attributable to the various components (planning, design, and construction)<sup>3</sup>, nor does the NewGen report indicate how much of the original debt (or remaining debt) is allocated to existing facilities as opposed to planned/contemplated facilities (including, but not limited to, the subject Decertified Area). Based upon the NewGen report, the implication is that there are only two areas of the whole CCN from which the debt should be recovered: (1) the area that is currently served by Marilee SUD (existing customers) and (2) the subject Decertified Area -- as all of the approximate \$1.59 million of debt, according to NewGen, is attributed to the existing customers and

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<sup>3</sup> It is reasonable to assume that the majority of the debt would apply to construction of facilities, of which there is none in the subject Decertified Area.

the subject Decertified Area.<sup>4</sup>

Based on these observations, UVE concurs with the opinion contained in the Willdan report with respect to Factor Two.

**UVE CONCLUSION FOR FACTOR TWO: Compensation = \$0**

**FACTOR THREE** - *The value of the service facilities of the retail public utility located within the area in question.*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor Three.

**UVE CONCLUSION FOR FACTOR THREE: Compensation = \$0**

**FACTOR FOUR** - *The amount of any expenditures for planning, design, or construction of service facilities that are allocable to service to the area in question.*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor Four.

**UVE CONCLUSION FOR FACTOR FOUR: Compensation = \$0**

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<sup>4</sup> According to Docket 52497, there was a petition by HC Celina, 414, LLC, for an expedited release from the same CCN (Marilee SUD; CCN 10150). The appraisal prepared for Marilee SUD for Docket 52497 (also prepared by NewGen) addressed the issue of recovering a portion of the Marilee SUD debt from the Petitioner for the Decertified Area (for Docket 52497) based upon the number of future connections in that Decertified Area. Even though in that case the number of connections was 0, the analysis demonstrates that there are other areas within CCN 10150 that potentially will (or could) increase the number of connections within the Marilee SUD service area and those potential areas (and the count of those future connections) are not being included in the allocation of the debt in the subject case, as *all of the remaining \$1.59 million* of debt is being attributed to the sum of (1) the existing customers and (2) the potential/future customers exclusively in the subject Decertified Area.

**FACTOR FIVE** - *The amount of the retail public utility's contractual obligations allocable to the area in question.*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor Five.

**UVE CONCLUSION FOR FACTOR FIVE: Compensation = \$0**

**FACTOR SIX** - *Any demonstrated impairment of service or increase of cost to consumers of the retail public utility remaining after the decertification.*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor Six.

**UVE CONCLUSION FOR FACTOR SIX: Compensation = \$0**

**FACTOR SEVEN** - *The impact on future revenues lost from existing customers.*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor Seven.

**UVE CONCLUSION FOR FACTOR SEVEN: Compensation = \$0**

**FACTOR EIGHT** - *Necessary and reasonable legal expenses and professional fees.*

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concludes an opinion of compensation for legal expenses and professional fees of \$80,738 (\$68,567 for legal; \$2,790 for engineering fees; and, \$9,381 for the NewGen report).

With regard to the legal fees, UVE has reviewed the subject docket as well as other PUC dockets in order to determine what is reasonable for legal fees. In most cases, the legal fees for similar petitions appear to be in the range of approximately \$4,000 to \$7,500. The subject legal fees reported by NewGen (\$68,567) appear to be excessive relative to similar matters. However, UVE has not been provided copies of the invoices purported to amount to \$68,567. Further, UVE is not able to determine, based upon a review of the docket files, if the legal fees, as purported by NewGen, are substantiated by the services provided by the CCN holder's counsel. UVE discussed this issue with the client (Attorney Lehmann) and advised the client that UVE will not address the compensation due for legal fees and, instead, recommends the client address the issue with the parties directly.

With regard to the engineering fees, UVE has reviewed the subject docket as well as other PUC dockets in order to determine if the engineer's fees are reasonable. UVE did not find any evidence that an engineer's assistance was a critical or necessary component of the subject matter. Further, UVE found no evidence in other dockets pertaining to similar petitions for decertification that engineering services were necessary. Lastly, UVE found no evidence of the work performed by an engineer that substantiates a fee of \$2,790.

With regard to the appraisal fees due to NewGen for its services, each party in the subject matter is responsible for its own valuation expert's fees.

**UVE CONCLUSION FOR FACTOR EIGHT: Compensation = \$0**

**FACTOR NINE - Other relevant factors.**

The Willdan report concluded there was no compensation due for this factor.

The NewGen report concluded there was no compensation due for this factor.

Comments: UVE concurs with the opinions of the Willdan and NewGen reports, respectively, with respect to Factor Nine.

**UVE CONCLUSION FOR FACTOR NINE: Compensation = \$0**

**Summary of Compensation Opinions**

The following is a summary of the compensation opinions of Willdan, NewGen, and UVE.

<b>SUMMARY OF COMPENSATION OPINIONS</b>			
<b>DECERTIFICATION OF PART OF CCN 10150 (Docket 50404)</b>			
<b>FACTOR</b>	<b>WILLDAN REPORT <i>For Petitioner</i></b>	<b>NEWGEN REPORT <i>For MSUD</i></b>	<b>UVE CONCLUSION</b>
ONE	\$0	\$0	\$0
TWO	\$0	\$130,747	\$0
THREE	\$0	\$0	\$0
FOUR	\$0	\$0	\$0
FIVE	\$0	\$0	\$0
SIX	\$0	\$0	\$0
SEVEN	\$0	\$0	\$0
EIGHT	\$0	\$80,738	\$0
NINE	\$0	\$0	\$0
<b>TOTAL</b>	<b>\$0</b>	<b>\$211,485</b>	<b>\$0</b>

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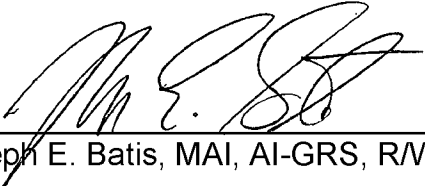
**Statement of Certification – Joseph E. Batis, MAI, AI-GRS, R/W-AC**

I certify that, to the best of my knowledge and belief:

- the statements of fact contained in this report are true and correct.
- the reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no present or prospective interest in the property that is the subject of this report and no personal interest with respect to the parties involved.
- I have not performed any services pertaining to the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment.
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
- my engagement in this assignment was not contingent upon developing or reporting predetermined results.
- my compensation for completing this assignment is not contingent upon the developing or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
- my analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice* and in conformity with the requirements of the *Code of Professional Ethics* and the *Standards of Professional Appraisal Practice* of the Appraisal Institute.
- I have not made a personal inspection of the property that is the subject of this report.

As of the date of this report, Joseph E. Batis has completed the requirements of the continuing education program of the Appraisal Institute.

Furthermore, I certify that the use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.

  
\_\_\_\_\_  
Joseph E. Batis, MAI, AI-GRS, R/W-AC

November 3, 2022  
Date

*Professional Profile*  
**Joseph E. Batis, MAI, AI-GRS, R/W-AC**

**EMPLOYMENT HISTORY**

Owner and President of Utility Valuation Experts, Inc.

Real Estate Appraiser and Consultant since 1983

**PROFESSIONAL AFFILIATIONS, MEMBERSHIPS, AND CERTIFICATIONS**

Member of the Appraisal Institute

MAI designation, AI-GRS designation (Member #63637)

Member of the International Right of Way Associations

R/W-AC certification (Member #7482)

Member of the American Water Works Association

(Member #03666505)

Member of the Illinois Chapter of the National Association of Water Companies (NAWC)

Approved Instructor

Appraisal Institute - multiple continuing education and qualifying education courses

**DEVELOPMENT OF STATE-ACCREDITED CONTINUING EDUCATION SEMINARS**

- *The Valuation of Water of Wastewater Systems (2020)*
- *Pipeline and Corridor Easements – Aren't They All the Same? (2020)*
- *Understanding Easements – What is Being Acquired? (2003)*
- *Pipelines and Easements – Can They Co-Exist? (2003)*

**STATE – GENERAL CERTIFICATION APPRAISAL LICENSES**

Illinois - Missouri - Tennessee - Virginia - Texas – Arizona - Maryland

**PRIVATE AND PUBLIC UTILITY ASSET VALUATION (2013-PRESENT)**

Valuation and consulting services of public water treatment and distribution assets, public wastewater collection and treatment assets, shared assets (treatment plants), natural gas delivery systems, and other public infrastructure and assets for acquisition, disposition, allocation, or resolution of value disputes for more than 75 assignments during the last 7 years.



## **SPECIALIZED VALUATION SERVICES AND EXPERIENCE**

- Right of Way / Energy Transmission Lines / Fiber Optic Corridors / Railroad Corridors
- Power Transmission Line Corridors / Solar Energy Fields / Underground Gas Storage Fields
- Public and Investor-Owned Utility Systems (water distribution and wastewater collection)
- Valuation of Permanent and Temporary Easements
- Market Impact Studies for Corridors (Power Transmission Lines, Underground Pipelines)
  - Remainder Properties / Proposed Projects / Expansion of Infrastructure Systems

## **LITIGATION, ARBITRATION, AND CONSULTING SERVICES**

- Expert Testimony (Federal and Circuit Courts, Commerce Commission Hearings)
- Value Dispute Resolution Services - Review and Rebuttal Services
- Litigation Consultation and Support Services

## **IMPACT STUDIES – SOLAR FIELD PROJECTS (2018)**

Market impact studies pertaining to the proposed development of solar energy fields in several counties in the Chicago metropolitan area. Each market study included a site analysis and “before and after” analysis to determine the impact from the proposed solar projects to properties in the immediate and general market areas of the proposed facilities.

## **IMPACT STUDIES – PROPERTY VALUES AFFECTED BY INTERMODAL FACILITIES (2020)**

Market impact studies pertaining to 15 warehouse, industrial, and intermodal facilities developed from 1988-2020 and their impact on more than 6,000 residences. Analysis included a review of traffic reports, proposed infrastructure developments, and independent study of proximity impacts. Scope of work included multiple appearances in front of multiple village and city committees to provide testimony.

## **MARKET STUDY AND APPRAISAL REVIEW - CONTAMINATION (2018)**

Appraisal review services and market data research pertaining to the impact to the market values of numerous properties resulting from the contamination of underground water sources. Scope of work included technical reviews of multiple appraisals, independent market research, and consultation with clients to assist with settlement strategy.

## **MARKET IMPACT STUDY – CONTAMINATION FROM UNDERGROUND LEAK AT NUCLEAR POWER GENERATING STATION (2007)**

Coordinated the market research, analysis, and valuation services pertaining to the impact of more than 500 properties affected by an underground leak of tritium from the Braidwood Nuclear Power Plant. Market Study included a before and after statistical analysis including market development patterns and value trends in 20 communities during a five-year time frame.

## **ANALYSIS AND ALLOCATION OF THE CONTRIBUTORY VALUES OF MULTIPLE PERMANENT EASEMENTS CO-LOCATED IN A TRANSMISSION CORRIDOR (2019-2020)**

An analysis and valuation of the easement values for multiple contiguous and overlapping permanent easements within a right-of-way corridor, including gas pipeline easements, power transmission lines, public utility (water line) easements, and recreational easements. Scope of work included preliminary valuation, consultation, and technical reviews of multiple appraisal reports to assist client in settlement strategy.

## **MANAGEMENT AND SUPERVISION OF VALUATION SERVICES FOR SIMULTANEOUS ACQUISITION OF EASEMENTS FOR MULTIPLE OIL PIPELINES (2012-2020)**

Valuation and consulting services including the coordination and management of preliminary land value studies, market impact studies to support "good-faith" offers, appraisal services for acquisition and condemnation hearings, appearance and testimony at Illinois Commerce Commission hearings, expert testimony at trial, appraisal review services, preparation of rebuttal reports and appearance for rebuttal testimony, and preparation for settlement conferences. Project involved acquisition of permanent and temporary easements for the simultaneous construction of three interstate oil transmission lines. Market research included an analysis of statistical data pertaining to 18 residential subdivisions impacted by underground pipelines. Responsible for management of the projects' valuation services pertaining to more than 2,000 properties in 22 counties including the managing, training, and supervising of 35 appraisers, consultants, and researchers that participated in the acquisition projects.

## **INTERSTATE NATURAL GAS PIPELINE PROJECT (2000-2003)**

Valuation and consulting services including the coordination and management of appraisal services for acquisition and condemnation hearings in federal court, appraisal review services, rebuttal report/testimony, and settlement conferences. Project involved acquisition of permanent and temporary easements for the construction of a natural gas transmission line. Responsible for management of the project's valuation services including more than 600 properties in 4 counties.

## **VALUATION REVIEW SERVICES AND EXPERT TESTIMONY FOR 1,000+ MILE RAILROAD CORRIDOR**

In 2019, provided valuation and consulting services including the review of appraisals and consulting reports pertaining to the valuation of a 1,000+ mile fiber optic corridor within a railroad corridor extending through Virginia, North Carolina, South Carolina, Tennessee and Illinois.

**RECENT AND PENDING PRESENTATIONS, DISCUSSION PANEL APPEARANCES,  
AND OFFERINGS OF SELF-DEVELOPED SEMINARS**

Appraisal Institute - Chicago Chapter

*Midwest Easements - Aren't They All the Same?*

Chicago, IL (2020); additional offerings: Springfield, IL (March 2021); Tennessee (April 2021);  
Louisiana (July 2021); Rockford, IL (May 2022)

Illinois Municipal League Association - 2019 Annual Conference

*What's the Value of Your Public Utility System?*

Chicago, IL; 2019

Appraisal Institute - Chicago Chapter

*The Valuation of Water and Wastewater Systems*

Chicago, IL; 2021; additional offerings: Louisiana (July 2021)

Will County Estate Planning Council

*Valuation and Regulatory Issues - Updates*

Lockport, IL; 2018

Appraisal Institute - 2019 National Conference

*Valuation of Easements - Litigation Issues*

Denver, CO; 2019

International Right of Way Association - Chapter 12

*Valuation of Easements for Pipelines*

Aurora, IL; 2020

Southwest Suburban Water Coalition

*Valuation of Easements within Easements in Right-of-Way Corridors*

Orland Park, IL; 2019

Illinois Property Assessment Institute - 2021 Annual Conference

*Highest and Best Use Analysis*

Bloomington, IL; 2021

Illinois Property Assessment Institute - 2021 Annual Conference

*The Valuation of Privately-Owned Water and Wastewater Utility Systems*

Bloomington, IL; 2021

Appraisal Institute - Chicago Chapter

*Illinois Appellate Court Cases - Impacts to Valuation Experts*

Chicago, IL; Pending 2021

## MOST RECENT APPRAISAL INSTITUTE EDUCATIONAL AND INSTRUCTOR EXPERIENCE

**APPRAISAL REVIEW THEORY-GENERAL (AUDIT)**  
OCTOBER 2020, PITTSBURGH, PA

**THE APPRAISER AS AN EXPERT WITNESS (AUDIT)**  
SEPTEMBER 2020, PITTSBURGH, PA

**MIDWEST PIPELINE AND CORRIDOR EASEMENTS  
(DEVELOPER & PRESENTER)**  
SEPTEMBER 2020, CHICAGO, IL

**VALUATION OF CONSERVATION EASEMENTS**  
March 2020, Ft. Lauderdale, FL

**GENERAL APPRAISAL INCOME PART II  
(INSTRUCTOR AUDIT)**  
October 2019, Chicago, IL

**BASIC APPRAISAL PRINCIPLES (INSTRUCTOR)**  
March 2019, Chicago, IL

**GENERAL INCOME APPROACH (CO-INSTRUCTOR)**  
February 2019, Chicago, IL

**GENERAL SALES COMPARISON APPROACH  
(INSTRUCTOR AUDIT)**  
February 2019, Chicago, IL

**GENERAL APPRAISER INCOME APPROACH PART I  
(INSTRUCTOR AUDIT)**  
November 2018, Nashville, TN

**GENERAL APPRAISER PROCEDURES (CO-INSTRUCTOR)**  
October 2018, Chicago, IL

**INSTRUCTOR QUALIFYING CONFERENCE**  
September 2018, Chicago, IL

**ADULT LEARNING – EFFECTIVE CLASSROOM LEARNING**  
September 2018, Online Webinar

**LITIGATION APPRAISING:  
SPECIALIZED TOPICS AND APPLICATIONS**  
July 2018, Roseville, MN

**THE APPRAISER AS AN EXPERT WITNESS:  
PREPARATION AND TESTIMONY**  
May 2018, Woburn, MA

**QUANTITATIVE ANALYSIS**  
March 2018, Chicago, IL

**NATIONAL USPAP UPDATE COURSE**  
February 2018, Chicago, IL

**EMINENT DOMAIN AND CONDEMNATION**  
September 2017, Online Seminar

**RATES AND RATIOS: MAKING SENSE OF  
GIMs, OARs, AND DCF**  
September 2017, Online Seminar

**NATIONAL USPAP UPDATE COURSE**  
May 2016, Chicago, IL

**NATIONAL USPAP UPDATE COURSE**  
July 2015, Columbus, OH

**INSTRUCTOR WEBINAR**  
May 2015, Online Webinar

**BUSINESS PRACTICE AND ETHICS**  
March 2015, Online Seminar

**INSTRUCTOR WEBINAR**  
May and October 2014, Online Webinar

**GENERAL APPRAISER MARKET ANALYSIS  
AND HIGHEST AND BEST USE**  
January 2014, Chicago, IL

**INSTRUCTOR WEBINAR**  
April and October 2013, Online Webinar

**KNOWLEDGE CENTER FOR INSTRUCTORS**  
October 2012, Online Webinar

**CANDIDATE FOR DESIGNATION PROGRAM**  
July 2012, Online Webinar

**NATIONAL USPAP UPDATE COURSE**  
June 2012, Chicago, IL

**GENERAL APPRAISER INCOME APPROACH PART I**  
October 2011, Chicago, IL

**NATIONAL USPAP UPDATE COURSE**  
September 2011, Chicago, IL