

**State Board of Assessors
Meeting Minutes
Webex Meeting
Tuesday, March 9, 2021**

Chairperson Gregg Larson convened the meeting at 8:30am.

Board members in attendance:

Gary Amundson	Joy Kanne
Charlie Blekre	Gregg Larson
Andrea Fish	Mike Reed
Matt Gersemehl	Lori Schwendemann
Jane Grossinger	

Agenda for the March 9, 2021 meeting was reviewed. Charlie Blekre moved to approve the agenda. Jane Grossinger seconded the motion. The motion carried.

Minutes of the January 12, 2021 meeting were reviewed. Joy Kanne moved to approve the minutes. Matt Gersemehl seconded the motion. The motion carried.

Patrick Chapman, MAAO President, joined the board meeting at 9:00 am.

Updates

- **Form Report Update**

Date	Submitted Reports	Approved Reports	Rejected Reports	Reports being Graded
July 1, 2013 – December 31, 2013	6	6	0	0
January 1, 2014 – December 31, 2014	24	24	0	0
January 1, 2015 – December 31, 2015	27	27	0	0
January 1, 2016 – December 31, 2016	57	57	0	0
January 1, 2017 – December 31, 2017	26	26	0	0
January 1, 2018 – December 31, 2018	24	24	0	0
January 1, 2019 – December 31, 2019	28	28	0	0
January 1, 2020 – December 31, 2020	41	38	3	0
January 1, 2021 – March 9, 2021	13	8	1	4
Approved Reports (7/1/2013 –3/9/2021)	Received AMA	Received SAMA	Received CMAS	Have not applied for AMA
239	183	14	5	39

Updates (cont.)

- **Trainee Registration:** An email was sent out to all 87 County Assessors on February 4, 2021; board members were copied on the email.
- **MAAO Course Evaluations:** Gregg Larson presented his findings of evaluations in a summary that he created for the board to review.
- **Online Course Standards:** CEH Committee used the online standards while reviewing continuing education course requests. The committee found it difficult to add any benchmarks for these types of courses. The standards are more for course developers, not as an approval source for course requests.
- **MAAO Executive Board Meeting:** Jane Grossinger attended the February 9, 2021 meeting and presented them with an update, based on the Board of Assessors minutes from the previous two board meetings. The only discussion from the executive board was about the future of the CMA licensure track. Jane explained that there will be more meetings and discussion in the future. Jane confirmed that she will attend the May Executive Board meeting.
- **CMA/AMA 7/1/2022 deadline:** A group comprised of members of the board, MAAO, MAAP, and the Department of Revenue met for the first time on February 19, 2021, to discuss the future of the CMA license. They determined the scope, who is impacted, and the next steps for future conversations. A CMA document was sent out to the group members to share with their groups. Another meeting will be scheduled late March/early April to discuss possible solutions from their representative groups.
- **Sponsoring Organizations for Licensure Courses:** Courses were reviewed for an assessor who moved from California. The organization that provided the board approved licensure courses was Allied Business School. The course content for all of the courses reviewed were equivalent to other board approved courses provided by recognized sponsoring organizations.
- **Assessor Licensure Standards:** Gary Amundson reported that the standards going forward; Jessi Glancey, Andrea Fish, Joy Kanne and Gary Amundson opened the project and will focus on the SAMA standards, pulling from AMA putting into SAMA, and including a new standard for management and leadership for SAMA standards. They will be having monthly meetings and report their progress at the next board meeting.
- **MAAO Curriculum & Assessor Standards Committee:** Reviewing the Basic Income course that will be taught this summer. Starting to create a plan for the review of Mass Appraisal, which they will start in June. The committee touched base with Joy Kanne, the instructor, and she is looking forward to working with the committee on this review and update.
- **Complaint Summary:** Since January 2021 the Department of Revenue has received no new complaints. At this time all investigations have been closed, and no new cases have been opened.

Discussion Items

- **Mission & Vision Statement:** The board reviewed and discussed the following items. Julie Rapacki assisted the board with the vision statement and the discussion for identifying improvements.
 - **Mission Statement:** "Promote public trust in the Minnesota property tax system and provide oversight of assessor licensing, continuing education, and ethical conduct." Charlie Blekre made a motion to accept the statement as written. Mike Reed seconded the motion. The motion carried.
 - **Vision Statement Discussion:** The board members shared their vision statements and selected the specific words for the vision statement. Gregg Larson & Jane Grossinger volunteered to review the words for the statement and report back at the May meeting with a better option for the wording.
 - **Self-Assessment Improvements identified**
 - All board members will actively participate in the decision making and other activities of the board.
 - We need a robust plan to meet our long-term objectives. The Board decided that goals need to be set as soon as possible, Gregg Larson and Joy Kanne volunteered to develop a plan on what the board could accomplish during the rest of the year and will report back to the board in May.
 - The board needs Bylaws that address succession planning and other procedural matters. Since the board does not have an executive committee to draft bylaws, Gregg Larson and Matt Gersemehl volunteered to develop an outline for the bylaws to review at the May meeting.
- **Fundamentals of Real Property Appraisal Course:** Jane Grossinger presented her findings based on the AMA Standards. Chapter 1 of the course met many of the AMA Standards in regard to fundamental real estate definitions regarding value, highest and best use and neighborhood. Chapters 2 - 4 focused on land valuation, cost approach and ratio studies, many of the objectives covered were not in the AMA Standards. Gary Amundson suggested starting a list of items to be reviewed to potentially be added to the AMA Standards. Jane Grossinger approves the course for credits similar to that of the MN Procedures, but will cross check the courses to compare content.
- **IAAO Course 400: Assessment Administration & Course 312: Commercial/Industrial Modeling** Matt Gersemehl presented his findings for these two IAAO courses based on the AMA Standards. Matt discovered that course 312 no longer exists, it was combined with course 311 Real Property Modeling Concepts and is a more advanced course equivalent to Mass Appraisal. It was decided by the board to remove course 312 from the property type specific list and add course 311 to the Mass Appraisal list. Matt felt the IAAO Assessment Administration course was more of a management and leadership course. Andrea Fish volunteered to review this course with the standards of a management and leadership course and bring her findings to the May board meeting.

Discussion Items (cont.)

- **Market Analysis and Highest & Best Use & Residential Site Valuation & Cost Approach:** Lori Schwendemann presented her findings for these two courses based on the AMA Standards. Market Analysis & Highest Best Use changed from residential, does not meet the property type specific category, it will only count as continuing education. The Residential Site Valuation & Cost Approach course does meet all of the standards as a property type specific course.
- **Licensure Course Standards:** It was decided it is not possible to consider setting a specific number of standards for a course to qualify as a licensure course, especially while the standards are still in development.
- **Licensure Course Attendance:** After much discussion, the board decided they are not obligated to have an attendance policy. It is up to each sponsoring organization to manage the attendance of students and have an attendance policy to follow.
- **Assessment Experience vs AMA License Requirement:** The board discussed the assessment experience timeline for the AMA license requirement, based on a special circumstance that was brought to the board. Matt Gersemehl made a motion to grant an additional year of experience to Eric Bjorklund, based on his extensive appraisal experience, as a licensed Minnesota Certified General Real Property Appraiser and a holder of a MAI designation from the Appraisal Institute. This would allow the applicant to apply for the AMA within the required timeline. Mike Reed seconded the motion. The motion carried.
- **Law Changes:** The board reviewed the current laws related to the board and assessor licensure; it was decided there were no changes needed at this time.
- **Education Survey:** Joy Kanne, Matt Gersemehl and Lori Schwendemann volunteered to help develop questions for the survey.
- **BOA Member Vacancy Notices:** Gregg Larson reviewed Statute 270.41 and the solicitation of names for an open position on the board. The board does not tell the Department of Revenue or MAAO how to advertise for applicants. Patrick Chapman stated MAAO will put out an email blast to the entire membership in the future.
- **Case Study Exams:** The board discussed the options for taking the exam with Patrick Chapman. Patrick explained that the exam has no time limit to complete the exam, and it's set up in two parts. MAAO has reasonable accommodations to assist anyone with exam anxieties.

Appointments with the Board

- **Emily Squyres, MAAO Education Coordinator:** Emily reviewed, the MAAO 2019-2021 course registrations and results with the board. She explained the reason for cancelling a few courses in 2021 and reviewed the courses that will be offered online in 2021. The IAAO online courses being offered in the fall, will follow IAAO's standards and testing procedures for online courses. Summer Seminars will be offering virtual and in person offerings, no hybrid, splitting in person and virtual only.

Approved Continuing Education Hours Requests

- **Analyzing Market Trends Using Excel:** Vanessa Thompson requested the board review this online course, sponsored by Kaplan, for continuing education. The board's continuing education committee approved this course for 7.5 continuing education hours.
- **Appraising Today's Manufactured Homes:** The board's continuing education committee reviewed this course sponsored by McKissock and approved it for 7 continuing education hours.
- **Form Report Graders Workshop:** Pat Chapman requested the board review this workshop, sponsored by MAAO, that was held online in February 2021 for continuing education. The board's continuing education committee approved this workshop for 4 continuing education hours.
- **Mastering Unique & Complex Property Appraisals:** Vanessa Thompson requested the board review this online course, sponsored by Kaplan, for continuing education. The board's continuing education committee approved this course for 20 continuing education hours.
- **Property Tax Appeals in MN 2021 Update:** Ann Miller requested the board review this online course, sponsored by MN Continuing Legal Education, that was held on February 22, 2021 for continuing education. The board's continuing education committee approved this course for 7 continuing education hours.
- **Residential Case Study Exam Workshop:** Emily Squyres requested the board review this workshop, sponsored by MAAO, for continuing education. The board's continuing education committee approved this course for 8 continuing education hours.
- **The Impact of COVID-19 On Hotel and Restaurant Values:** Reed Heidelberger requested the board review this online seminar, sponsored by IAAO, for continuing education. The board's continuing education committee approved this seminar for 1 continuing education hour.

Request for Licensure Course Approval

- **Bachelor of Arts; Minor in Business Degree:** Laura Ramboldt submitted her St Mary's University college degree as completion of the Management & Leadership course requirement. Jane Grossinger made a motion to approve. Joy Kanne seconded the motion. The motion carried.
- **Advanced Ag:** Jessi Glancey is requesting the board review this course, sponsored by MAAO, as an option for the Property Type Specific course and 15 continuing education hours. Gary Amundson made a motion to approve. Matt Gersemehl seconded the motion. The motion carried.

Applications for Certified Minnesota Assessor

Charlie Blekre made a motion to award the Certified Minnesota Assessor license to the following individuals.

Adam Bloomquist, Wright County

Tammy Wisniewski, Crow Wing County

Lori Schwendemann seconded the motion. The motion carried.

Application for Certified Minnesota Assessor Specialist

Charlie Blekre made a motion to award the Certified Minnesota Assessor Specialist license to the following individuals.

Theodore Anderson, Anoka County

Jane Grossinger seconded the motion. The motion carried.

Applications for Accredited Minnesota Assessor

Lori Schwendemann made a motion to award the Accredited Minnesota Assessor license to the following individuals.

Shirly Abear, Lyon County

Chris Baumberger, Murray County

Daniel Bethke, Dakota County

Jonathan Graves, Blue Earth County

Andrea Jones, City of Minneapolis

Ian Landreau, Ramsey County

Bradley Leibfried, Lincoln County

Joy Kanne seconded the motion. The motion carried.

Applications for Senior Accredited Minnesota Assessor

Charlie Blekre made a motion to award the Senior Accredited Minnesota Assessor license to the following individual.

Dawn Swisher, Otter Tail County

Mike Reed seconded the motion. The motion carried.

The chairperson set the next meeting date as Tuesday, May 11, 2021 at the St. Michael City Center in St. Michael, MN at 8:30 am.

Jane Grossinger made a motion to pay the expenses for the meeting. Lori Schwendemann seconded the motion. The motion carried.

Charlie Blekre made a motion to adjourn the meeting. Gary Amundson seconded the motion. The motion carried.