

**State Board of Assessors  
Meeting Minutes  
St. Michael City Center  
Tuesday, November 16, 2021**

Vice Chairperson Joy Kanne convened the meeting at 8:30am.

Board members in attendance:

Andrea Fish            Joy Kanne  
Matt Gersemehl      Mike Reed  
Jane Grossinger      Lori Schwendemann

Gary Amundson joined the meeting virtually.

Gregg Larson & Charlie Blekre were unable to attend.

Agenda for the November 16, 2021 meeting was reviewed. Andrea Fish moved to approve the agenda. Lori Schwendemann seconded the motion. The motion carried.

Minutes of the September 21, 2021 meeting were reviewed. Jane Grossinger moved to approve the minutes. Lori Schwendemann seconded the motion. The motion carried.

**Updates**

- **Form Report Update:**

Dates	Submitted Reports	Approved Reports	Rejected Reports	Reports being Graded
January 1, 2020 – December 31, 2020	41	41	0	0
January 1, 2021 thru March 9, 2021	14	14	0	0
March 10, 2021 thru May 11, 2021	8	8	0	0
May 12, 2021 thru July 13, 2021	26	25	1	0
July 14, 2021 thru September 21, 2021	17	17	0	0
September 22, 2021 thru November 16, 2021	13	6	5	2
	<b>78</b>	<b>70</b>	<b>6</b>	<b>2</b>
Passed Reports (1/1/2021 – 11/16/2021)	Received AMA	Have not applied for AMA		
70	46	24		

- **Form Report Grader:** Ryan Johnson completed all of the training and has been added as a form report grader.

## Updates (cont.)

- **MAAO Equal Eyes & Licensing Process:** The following was put in the October edition of MAAO's Equal Eyes publication: "The State Board of Assessors made a motion at their September board meeting that the board's Administrator may make decisions to approve or deny all CMA, CMAS, and AMA licenses based on Rule requirements. All CMA, CMAS, and AMA applications that have met the required licensing requirements and fees will be processed by the board's Administrator. A board meeting is no longer required to process these types of applications."
- **MN Open Meeting Law:** Kyle Gustafson provided the board with the new guide for the open meeting law that was just published by House Research.
- **Board Bylaws:** The board's bylaws have been placed in each of the board members' binders.
- **Reinstatement Policy:** The board's website and board members' binders have been updated with the new policy adopted at the board's September meeting.
- **MAAO Executive Board Meeting Update:** Jane Grossinger provided the following updates.
  - MAAO Executive Board Meeting was held on September 26<sup>th</sup> at Breezy Point Lodge, prior to the MAAO Conference. Jane reported that license applications will not have to wait for a Board meeting for approval, except the SAMAs which need an oral interview. Also, that we would be going to "meet & greet" regions that did not have a State Board member in their region.
  - MAAO Executive Board Meeting was held on November 3<sup>rd</sup> in St. Cloud, and Jane attended the meeting virtually. Jane reported that the State Board had not met since the Fall Conference, so there were no new business updates. Jane also noted that Gregg Larson, current Board Chair and Public representative for 16 years will be retiring from the Board. There was much discussion at this meeting about the education that will be available prior the AMA deadline in the summer, and that there is a need for a weeklong property-specific course to be offered earlier in 2022.
- **MAAO Education Committee – Conference Content Meeting:** Jane Grossinger provided the following update.
  - MAAO Education Committee (Conference Content) met on October 28<sup>th</sup> in Baxter, MN. Jane attended the meeting virtually, reporting that the State Board met on the 21<sup>st</sup> of September, reporting that license applications will not have to wait for a Board meeting for approval, except the SAMAs which need an oral interview. Jane also shared that Regions may want to consider having educational opportunities at their region meetings, having a quest speaker, etc. for at least 1 hour of CEU. Pre-approval of the seminar is preferred. Mike Wacker reported that the Steering committee will have Tim Mitchell attend the November State Board of Assessor's meeting to discuss what courses will be needed in the future. In 2022, there will be a two-day assessor training boot camp and a two-day basic income course is being discussed. The Committee also brainstormed topics for the Fall Conference and Summer Seminars. They have a preliminary list of 30 classes.

## Updates (cont.)

- **MAAO Fall Conference:** Jane Grossinger shared that she gave a report for the State Board with similar information and that there would be more discussion about the Assessment Personnel education survey after the results were reviewed further. Jane attended the GIS seminar and thought the panel was very good. Lori Schwendemann shared that all of the classes she attended were very good. Matt Gersemehl attended the Tax Court seminar and thought the tax court judges did a great job of explaining how to testify to them and be comfortable.
- **MAAO Region Meetings:** Matt Gersemehl and Joy Kanne attended Region 2 and Region 5. Matt reported that the CMA topic came up at both meetings. The board, MAAO and DOR need to continue to discuss what assessment staff need for education, and to consider a road map for tech and clerical staff. Matt is also researching other states for their licensing and designations. A report will come out in 2022 from IAAO.

Jane Grossinger and Lori Schwendemann attended Region 8. There were no specific questions for the State Board. Discussion about the Marvin Windows Tax Court case, property valuations, and the PACE Courses. Jane and Lori will be attending Region 7 meeting on November 19<sup>th</sup>.

- **Mass Appraisal Basics Course:** The class went very well. They added a new activity to the last day, which ended up being a little to challenging, and they decided that they need to redo the activity for the next class.
- **Complaint Summary:** Since September 2021, the Department of Revenue has not received any additional complaints. At this time, all investigations have been closed, and no new cases have been opened.
- **Assessor Licensure Standards:** No activity since September; waiting on the leadership standards.
- **MAAO Curriculum & Assessor Standards Committee:** The committee completed the first round of the review for Mass Appraisal Basics and are working on the second phase of review. The newest version of the Mass Appraisal material was used in the September offering.

## Discussion Items

- **Proposed 2022 Board Meeting Schedule:** The board selected the meeting dates for 2022.
- **Board Work Plan:** The board reviewed the items on their work plan and discussed what actions needed to be taken.
- **New Ethics Course:** Jessi Glancey requested that a few board members be involved in developing the new Ethics course to brainstorm and possibly bring some insight to the material they will teach in Ethics, specifically, around the code of conduct and investigations. Joy Kanne and Andrea Fish volunteered to assist with the development of the Ethics course.
- **Application Process:** The board discussed the application process for the Temporary and SAMA license requests because these two license types were not in the motion from the September board meeting. Andrea Fish made a motion to give the board's administrator the authority to approve Temporary licenses. Lori Schwendemann seconded the motion. The motion carried. All SAMA licenses will be reviewed by the board at their board meetings.
- **Assessor Experience:** After much discussion, the board will require an employment verification letter from the Auditor and Treasurers offices, detailing the specific job duties to determine if any experience in that environment will be considered assessment experience for licensure.

## **Discussion Items (cont.)**

- **Trainee Registration Deadline:** The board reviewed Rule 1950.1020 and discussed if there would be any consequences to those who do not register with the board within 30 days of hire. Andrea Fish made a motion that if it is appropriate based on procedures, to send a letter to the County Assessor. Mike Reed seconded the motion. The motion carried.
- **Upgrading SAMA License by 7/1/2022:** Based on the board's reinstatement policy, what will an assessor be required to do in order to upgrade from the CMAS license back to their SAMA license level?
  - Based on this one situation, the board will require this assessor to take the 30-hour management and leadership course to meet the PACE requirement for the previous 4-year cycle. The CEHs earned from completing the 30-hour management and leadership course will be applied to the previous 4-year cycle.

Jane Grossinger made the motion to approve. Lori Schwendemann seconded the motion. The motion carried.

- **Public Board Member:** The board determined that they needed to nominate a new board chair, because the current public member Gregg Larson, will be retiring prior to the board's January meeting. The board moved forward with the following nominations.
  - **Nomination for Chair:** Lori Schwendemann made a motion to nominate Matt Gersemehl as chair. Mike Reed seconded the nomination. The motion carried. Matt Gersemehl is the chair for 2022.
  - **Nomination for Vice Chair:** Mike Reed made a motion to nominate Joy Kanne for vice chair. Matt Gersemehl seconded the nomination. The motion carried. Joy Kanne is the vice chair for 2022.
- **Assessment Personnel Training and Education Practices Survey Results:** Jane Grossinger, Lori Schwendemann, & Matt Gersemehl will review the results of the survey and bring their ideas to the next board meeting.
- **Future Rule Changes:** Mike Reed and Matt Gersemehl will review the board's rules and suggested changes and bring their recommendations to the next board meeting.
- **Inactive Licenses:** The board will discuss options for defining "inactive" licenses. This discussion is tabled until the January board meeting.
- **Commercial Course Options:** Matt Gersemehl reported that he is waiting for recommendations from a colleague.
- **IAAO Course Review:** Matt Gersemehl presented his findings and five of the courses still qualify based on assessment standards. Matt will have course write ups and recommendations available at the January meeting.
- **Residential Appraisal Course:** Joy Kanne reported that there was nothing to present at this time.

### **Approved Continuing Education Hours Requests**

- **2021 IAAO Annual Conference:** Brenda Hansford & Dave Buswell requested the board review this online conference, sponsored by IAAO for continuing education. The board's continuing education committee approved this conference for 1-12 continuing education hours.
- **2021 State Assessed Property Fall Forum:** Holly Soderbeck requested the board review this virtual seminar, sponsored by Department of Revenue, offered on November 17, 2021 for continuing education. The board's continuing education committee approved this seminar for 4.5 continuing education hours. This seminar will be part of the PACE education requirement.
- **15th Annual Retail & Restaurant Summit:** Ashley Gunderson requested the board review this summit, sponsored by MN Real Estate Journal, offered on November 18, 2021 for continuing education. The board's continuing education committee approved this summit for 4 continuing education hours.
- **23rd Annual Industrial & Economic Development Summit:** Ashley Gunderson requested the board review this summit, sponsored by MN Real Estate Journal, offered on November 12, 2021 for continuing education. The board's continuing education committee approved this summit for 4 continuing education hours.
- **Administering New Laws:** Jessi Glancey requested the board review this virtual seminar, sponsored by Department of Revenue – Property Tax Outreach, that will be offered on December 1, 2021 for continuing education. The board's continuing education committee approved this seminar for 3 continuing education hours. This seminar will be part of the PACE education requirement.
- **Exemption – Preparing for an Exempt Year:** Jessi Glancey requested the board review this online seminar, sponsored by Department of Revenue – Property Tax Outreach, offered on October 27, 2021 for continuing education. The board's continuing education committee approved this seminar for 3 continuing education hours. This seminar will be part of the PACE education requirement.
- **Land-Ownership, Titles, Deeds & Descriptions:** Roxane Alden requested the board review this online course, sponsored by McKissock for continuing education. The board's continuing education committee approved this course for 3 continuing education hours.
- **Legal Descriptions:** Roxane Alden requested the board review this online course, sponsored by McKissock for continuing education. The board's continuing education committee approved this course for 3 continuing education hours.
- **Marshall & Swift Commercial Cost Approach:** Jodi Lindberg requested the board review this online course, sponsored by Columbia Institute for continuing education. The board's continuing education committee approved this course for 14 continuing education hours.
- **Winter Housing Update:** Matt Gersemehl requested the board review this seminar, sponsored by MAAO – Region 9, that will be offered on December 9, 2021 for continuing education. The board's continuing education committee approved this seminar for 3 continuing education hours.

### **Denied Continuing Education Hours Requests**

- **15th Annual Senior Housing Summit:** Ashley Gunderson requested the board review this summit, sponsored by MN Real Estate Journal for continuing education. The board's continuing education committee denied this summit for 4 continuing education hours. The consensus of the CEH committee was that this summit did not have enough relevant assessment related education to consider it for continuing education.

### **Appointments with the Board**

- **Tim Mitchell, MAAO Education Steering Committee:** Tim presented a handout with the items the education steering committee would like to address in the future. One of the items was a new online technology called Owl. The board discussed the lack of instructors, how to encourage assessors to be instructors, possibly offer incentives like paying them for their time, more recognition, have written expectations for instructors, and/or giving additional CEHs for developing courses. The board also would like to see more 15-hour property type-specific courses offered prior to July 1, 2022 for those assessors that need to get their AMA by this deadline date.

### **Approved Applications for Certified Minnesota Assessor**

- **Amy Albers**, Pope County
- **Dennis Bannister**, Jackson County
- **Joseph Estlie**, Hennepin County
- **Tara Kochendorfer**, Dakota County
- **Sarah Lanier**, Cottonwood County
- **Selena Lopez Cardenas**, Murray County
- **Wayne Maras**, Cottonwood County
- **Ashley Riel**, Wilkin County
- **Ed Zimny**, Crow Wing County
- **Brent Zinda**, Crow Wing County

### **Approved Applications for Accredited Minnesota Assessor**

- **Scott Adams**, Rock County
- **Richard Bryan**, Ramsey County
- **Carice Golberg-Cummins**, Hubbard County
- **Brian Grahek**, St Louis County
- **David Grev**, Cottonwood County
- **Rachel Jacobs**, Rock County
- **Amanda Johnston**, Crow Wing County

### **Approved Applications for Accredited Minnesota Assessor (cont.)**

- **Stephan Martynow**, City of Minneapolis
- **Lisa Olmen**, Hennepin County
- **Patrick Orent**, St Louis County
- **Perry Ponshock**, St Louis County
- **Gregory Schmitt**, Olmsted County
- **Amos Vogel**, Local Assessor in Brown County
- **Jeffery Wagner**, Wabasha County
- **Kimberly Wee Sit**, Redwood County

### **Applications for Senior Accredited Minnesota Assessor**

Andrea Fish made a motion to award the Senior Accredited Minnesota Assessor license to the following individuals.

- **Kim Kirchoff**, Renville County
- **Jean Nelson**, Lincoln County

Jane Grossinger seconded the motion. The motion carried.

Mike Reed made a motion to award the Senior Accredited Minnesota Assessor license to the following individual.

- **Alisa Jacobsen**, Lake of the Woods County; SAMA Oral Interview

Lori Schwendemann seconded the motion. The motion carried.

Jane Grossinger made a motion to award the Senior Accredited Minnesota Assessor license to the following individual.

- **Brian Messer**, City of Minneapolis; SAMA Oral Interview

Mike Reed seconded the motion. The motion carried.

Andrea Fish made a motion to award the Senior Accredited Minnesota Assessor license to the following individual.

- **Katelyn Nytes**, Scott County; SAMA Oral Interview

Mike Reed seconded the motion. The motion carried.

Jane Grossinger made a motion to invite Jeremy Gleason to return for a second interview. Mike Reed seconded the motion. The motion carried.

The vice chairperson set the next meeting date as January 13, 2022, at the St. Michael City Center in St. Michael, MN at 8:30 am.

Lori Schwendemann made a motion to pay the expenses for the meeting. Andrea Fish seconded the motion. The motion carried.

Matt Gersemehl made a motion to adjourn the meeting. Lori Schwendemann seconded the motion. The motion carried.