

**State Board of Assessors
Meeting Minutes
St. Michael City Center
Tuesday, March 8, 2022**

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

Charlie Blekre moved to open the meeting. Andrea Fish seconded the motion. The motion carried.

Board members in attendance:

Gary Amundson Joy Kanne
 Charlie Blekre Mike Reed
 Andrea Fish Lori Schwendemann
 Jane Grossinger

Matt Gersemehl was unable to attend the meeting.

Agenda for the March 8, 2022 meeting was reviewed. Andrea Fish moved to approve the agenda. Lori Schwendemann seconded the motion. The motion carried.

Minutes of the January 13, 2022 meeting were reviewed. Charlie Blekre moved to approve the minutes. Jane Grossinger seconded the motion. The motion carried.

Jessi Glancey attended the meeting.

Updates

- **Form Report Update:**

Dates	Submitted Reports	Approved Reports	Rejected Reports	Reports being Graded
July 1, 2013 – December 31, 2019	192	192	0	0
January 1, 2020 – December 31, 2020	41	41	0	0
January 1, 2021 thru March 9, 2021	13	13	0	0
March 10, 2021 thru May 11, 2021	11	11	0	0
May 12, 2021 thru July 13, 2021	20	20	0	0
July 14, 2021 thru September 21, 2021	19	18	1	0
September 22, 2021 thru November 16, 2021	10	8	2	0
November 17, 2021 thru December 31, 2021	6	5	1	0
Totals for 2021	79	75	4	0
January 1, 2022 – March 8, 2022	8	5	0	3
Approved Reports (1/1/2021 – 3/8/2022)	Received AMA	Have not applied for AMA		
85	57	29		

Updates (cont.)

- **Narrative Reports:** Bob Wilson will no longer be grading these reports, as he is retiring this spring. Patrick Chapman will take over in his place. Patrick will be reviewing the Narrative Resources for future changes.
- **IRS Mileage Rate:** Increased from 56 cents per mile to 58.5 cents per mile; expense reports reflect this increase.
- **Locally Assessed Jurisdiction Report:** After further research, it was decided not to post this report on the board's website.
- **Licensure Education Policy:** The Management & Leadership course policy was updated with the decision made at the January meeting and put on the website and in the board members manuals.
- **Oral Interview Questions:** Questions 22 & 27 were updated as suggested at the January board meeting.
- **AMA Update:** There are 125 assessors that need to get their AMA by July 1, 2022.
- **New Board Member Process:** The Department of Revenue decided that background checks would be processed for all applicants. Once the background checks are completed and returned, an interview will take place prior to selecting a new board member.
- **New Ethics Course:** Andrea Fish, Joy Kanne, and Jessi Glancey provided an update on the future of the new Ethics class. It's going to be shorter and a virtual training so it will be easier to attend. They suggested that a few of the board members be a part of the presentation. Matt Gersemehl and Mike Reed will be part of the video.
- **MAAO Executive Board Meeting Update:** Patrick Chapman reported that at the February 8, 2022 board meeting that the Executive Board created a four-member Ad Hoc committee to research the CMA issue. MAAO would like a couple volunteers from the Board of Assessors to be on the committee. Matt Gersemehl, Jane Grossinger, & Lori Schwendemann volunteered.
- **Complaint Summary:** Since January 2022, 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.
- **MAAO Curriculum & Assessor Standards Committee:** Jessi Glancey presented the following updates:
 - Jessi is stepping down as co-chair of the committee. Ben Bedard will remain as co-chair and Annalee Jones is going to replace Jessi.
 - Jessi will remain as a member of the committee for another year to help with transition.
 - Per the MAAO 5-year plan, the CAS committee will be reviewing/updating the following courses this year: LEAD, Basic Apartments, Assessment Administration (new MAAO version is being worked on), and Mass Appraisal (small/minor updates, continued from last year's update project)
 - The CAS committee is also drafting a plagiarism policy for MAAO. A proposed version will be presented at the May executive board meeting.

Discussion Items

- **Assessor Licensure Standards:** Gary Amundson, Andrea Fish, Joy Kanne, & Jessi Glancey presented the Assessor Licensure Standards. The board decided the standards will be placed on the assessor licensing system. Matt Gersemehl will present the standards at MAAO's Summer Seminar in May to demonstrate the why and how to use this valuable tool. Based on the standards, Andrea will create more leadership questions for the SAMA oral interview. An email announcement will be sent out to all licensed assessors about the standards after the May board meeting. The board will create a committee at the May board meeting to review and update the standards.
- **April Newsletter:** The board reviewed the newsletter and made a few changes.
- **Future Rules and Statute Changes:** The board reviewed the outline for future rule changes and agreed they were ready to be sent for the start of the rule change process.
- **Suggested New Rule Change:** The board discussed the possibility of requiring cities of the first or second class to have the appointed City Assessor possess a minimum AMA license with SAMA required within 2 years of appointment. Moved this topic to the May board meeting for future discussion.
- **Upgrading from CMA to AMA:** The board reviewed the following suggested policies for those upgrading from a CMA to AMA, after the CMA license expires due to the AMA deadline date.
 - When upgrading from a CMA to AMA due to the AMA deadline date, within a 4-year cycle: Submit an AMA application and pay the application fee.
 - When upgrading from a CMA to AMA due to the AMA deadline date, after the start of the 4-year cycle: Complete all the continuing education requirements for the previous 4-year cycle including the Ethics seminar, prior to submitting the AMA application, and pay the application fee.

Andrea Fish made a motion to approve both policies. Gary Amundson seconded the motion. The motion carried. **Note:** The AMA requirements document will have a link to the board's policies.

- **First Year Checklist:** Jane Grossinger presented the changes to the checklist, and a few additional changes were suggested. Jane and Andrea Fish will work on the revisions and bring to the May board meeting.
- **Board Work Plan:** The board reviewed the revised workplan.
- **Applications:** The board discussed the option to modify the online assessors license & renewal applications to encourage more universal response and list all districts that employ the applicant. It was decided that the Department of Revenue's PTCO's will take the current licensed assessor list to their annual audit process to have the County Assessors review for verification.

Appointments with the Board

Amanda Dutcher, Education Coordinator & Mike Wacker, Education Steering Committee Chair attended the board meeting to review MAAO's 2021 course evaluations and the educational offerings for 2022. Amanda reported that over 40 educational offerings were held in 2021 and the feedback was overall positive.

Amanda reviewed the upcoming 2022 course offerings that MAAO will be providing. Amanda reported that it's been difficult to get instructors to teach the courses and seminars.

An MAAO instructor policy was discussed, and it was decided that Amanda and Joy Kanne will meet in the future to go over the needs that should be in the policies.

The board strongly suggested that MAAO have a pre-requisite for taking the CMA required courses in a specific order to put new assessors on the best path to succeed.

The board also suggested MAAO research the option of bundling their licensure courses so assessors can get a small discount if they register for all CMA courses at once and in a specific order.

The board asked for clarification on how MAAO handles classroom time based on classes they host from outside organizations, and Mike stated that MAAO will follow the outside organizations' policies and standards for each class. For example, if an outside organization requires a student to take the entire class to get credit, MAAO will follow that organization's policies and standards. Amanda will look into all of the sponsoring organizations standards and make the instructors aware of this.

Approved Continuing Education Hours Requests

- **Appraisal & Valuation Summit:** Ashley Gunderson requested the board review this summit, sponsored by MN Real Estate Journal, for continuing education. The board's continuing education committee approved this summit for 4 continuing education hours.
- **Bias & Fair Housing:** Vanessa Thompson requested the board review this virtual/classroom seminar, sponsored by B&B Professional, for continuing education. The board's continuing education committee approved this seminar for 4 continuing education hours.
- **Bias in Real Estate & Fair Housing:** Alex Oldefendt requested the board review this seminar, sponsored by The Columbia Institute, for continuing education. The board's continuing education committee approved this seminar for 5 continuing education hours.
- **Course 201 Appraisal of Land:** The board's continuing education committee approved this IAAO course for 30 continuing education hours.
- **Property Tax Appeals in Minnesota: 2022 Update:** Ashley Gunderson requested the board review this seminar, sponsored by MN Continuing Legal Education, for continuing education. The board's continuing education committee approved this seminar for 5 continuing education hours.
- **State Assessed Property Spring Forum:** Damaris Ledesma requested the board review this virtual forum, sponsored by MN Department of Revenue, that will be held on March 14, 2022 for continuing education. The board's continuing education committee approved this forum for 2.5 continuing education hours. This forum also qualifies towards the PACE education requirement.

Approved Continuing Education Hours Requests (cont.)

- **Where Did That Number Come From? Supporting Value Conclusion for Assessment, Appeals & Tax Court:** Brett Hall requested the board review this virtual seminar, sponsored by Hennepin County, for continuing education. The board's continuing education committee approved this conference for 4 continuing education hours.

Request for Continuing Education

- **2022 Vision National User Group Teleconference:** Vision Government Solutions Inc. (VGSi) is requesting the board review this Teleconference, sponsored by MAAO for 9 continuing education hours. Note: The board's CEH committee reviewed this request, but was unable to come to a unanimous decision. Andrea Fish made a motion to deny. Jane Grossinger seconded the motion. The motion carried. The consensus of the board was that this conference did not have enough relevant assessment-related education to consider it for continuing education.

Application for Certified Minnesota Assessor

- **Stephanie Brock**, Chippewa County
- **Coleman Collins**, City of Maple Grove
- **Zachary Houle**, Crow Wing County
- **Tyler Jakobs**, Chippewa County
- **Alex Oldefendt**, City of Eden Prairie
- **Amanda Plote**, Goodhue County
- **Karla Ray**, Murray County
- **Zachary Rexford**, City of Eden Prairie

Applications for Accredited Minnesota Assessor

- **Eric Bjorklund**, Hennepin County
- **Troy Davison**, Ramsey County
- **Debra Eversman**, Martin County
- **Shawn Halligan**, Anoka County
- **Benjamin Hansen**, Hennepin County
- **Kristin Mikula**, Rice County
- **Anne Sims**, St Louis County

Application for Senior Accredited Minnesota Assessor

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

- **Annalee Jones**, Polk County; SAMA Oral Interview

Jane Grossinger seconded the motion. The motion carried.

The co-chairperson set the next meeting date as Tuesday, May 10, 2022, at the St. Michael City Center in St. Michael, MN at 8:30 am.

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

Andrea Fish made a motion to adjourn the meeting. Lori Schwendemann seconded the motion. The motion carried.