

**State Board of Assessors
Meeting Minutes
St. Michael City Center
Tuesday, January 13, 2015**

Chairperson Steve Sinell convened the meeting at 9:30 am.

Board members in attendance were:

| | |
|-----------------|--------------|
| Keith Albertsen | Dave Marhula |
| Gary Amundson | Steve Sinell |
| Jane Grossinger | Deb Volkert |
| Brian Koester | |

Mike Amo and Gregg Larson were unable to attend.

Minutes of the November 25, 2014 meeting were reviewed. Keith Albertsen moved to approve the minutes. Dave Marhula seconded the motion. The motion carried.

Minutes of the November 25, 2014 closed meeting were reviewed. Gary Amundson moved to approve the minutes. Brian Koester seconded the motion. The motion carried.

Election of Officers

- Nomination for Vice Chair: Dave Marhula made a motion to nominate Brian Koester for Vice Chair, that all nominations cease and a unanimous ballot be cast. Jane Grossinger seconded the motion. The motion carried. Brian Koester is the Vice Chair.
- Nomination for Chair: Keith Albertsen made a motion to nominate Steve Sinell as Chair, that all nominations cease and a unanimous ballot be cast. Brian Koester seconded the motion. The motion carried. Steve Sinell is the Chair.

Grading Committee Appointments

- Form Report Grading Committee: Deb Volkert made a motion to reappoint all form report committee members: Patrick Chapman, Tina Dietrich-Von Eschen, Kyle Holmes, Kim Jensen, Keith Kern, Rebecca Malmquist, Ann Miller, Teresa Mitchell, and Nate Stulc with Bob Wilson as Interim Chair. Brian Koester seconded the motion. The motion carried. Bob Wilson as Interim until Pat Chapman takes over.
- Narrative Grading Committee: Dave Marhula made a motion to reappoint all narrative committee members: Kim Jensen and Rebecca Malmquist, with Bob Wilson as Chair. Gary Amundson seconded the motion. The motion carried.

Updates

- Form Report Update:

| Dates | Submitted Reports | Approved Reports | Rejected Reports | Reports being Graded |
|--------------------------------|-------------------|------------------|------------------|----------------------|
| July 1, 2013–December 31, 2013 | 6 | 6 | 0 | 0 |
| January 1, 2014–June 30, 2014 | 10 | 9 | 1 | 0 |
| July 1, 2014–January 1, 2015 | 15 | 12 | 2 | 1 |

| Passed Reports (7/1/2013 – 1/1/2015) | Received AMA | Have not applied for AMA yet | Received CMAS | Not enough experience |
|--------------------------------------|--------------|------------------------------|---------------|-----------------------|
| 27 | 12 | 11 | 5 | 1 |

- Newsletter was sent out via email to all assessors that provided an email address. The newsletter will be mailed to those assessors that did not provide an email address.
- The new report required by M.S. 270.41, Subd. 3a must be sent to the legislature by February 1, 2015. The report must address assessor disciplinary actions recommended to the board by the commissioner of revenue under M.S. 273.0645, Subd. 2 and is being worked on by Deb Volkert.
- Complaint Update – the board discussed whether to include names of individuals when disciplinary actions are reported in the board minutes.
 - Jane Grossinger made a motion that names will not be included in disciplinary actions mentioned in the minutes. Deb Volkert seconded the motion for discussion. The motion failed.
 - Dave Marhula made the motion to include the names in disciplinary actions mentioned in the minutes, excluding warnings. Brian Koester seconded the motion. The motion carried.
 - The Board imposed the following sanctions under Minnesota Statutes § 270.41, subd. 3 against Catherine Arth:
 - \$1,000 fine for violation of Sections 2a,2b and 2c of the Code of Conduct and Ethics for Licensed Minnesota Assessors; and
 - A \$500 fine for violation of Section 4 of the Code of Conduct and Ethics for Licensed Minnesota Assessors.
- The board discussed Senate File 70 which was introduced in the Legislature on January 12, 2015.

Approved Continuing Education Hours Requests

- ***60 Years Strengthening Communities Together Seminar*** – Elizabeth Diaz from Ehlers & Associates, Inc. requested CEH's for this seminar that will be held on February 5 – 6, 2015 and sponsored by Ehlers & Associates, Inc. The board's continuing education committee approved this request for 3 to a maximum of 10.5 continuing education hours for the entire seminar.
- ***Defensible Appraisal Practices Seminar*** – Scott Schutz requested CEH's for this seminar that was held on April 30, 2014 and sponsored by B & B Professionals. The board's continuing education committee approved this request for 8 continuing education hours.
- ***Residential Design: The Makings of a Good House Seminar*** - Scott Schutz requested CEH's for this seminar that was held on March 13, 2011 and sponsored by Appraisal Institute. The board's continuing education committee approved this request for 7 continuing education hours.
- ***Issues of Grain Elevator Valuation Seminar*** - Thomas Ernste Reineke requested CEH's for this seminar that will be held on January 21, 2015 and sponsored by American Society of Farm Managers and Rural Appraisers. The board's continuing education committee approved this request for 8 continuing education hours.
- ***Reo Appraisal – Appraisal of Residential Property for Foreclosure/Preforeclosure Seminar*** – Paul Grace requested CEH's for this seminar that was held on February 10, 2010 and sponsored by Appraisal Institute. The board's continuing education committee approved this request for 7 continuing education hours.

Requests for Income Course

- ***Paul Grace*** requested the board to review the course description for Highest and Best Use and Market Analysis sponsored by the Appraisal Institute to be used as an income course or elective course. Keith Albertsen made a motion to approve as an elective course. Jane Grossinger seconded the motion. The motion carried.
- ***Devon Quist*** requested the board to review the course description for Real Estate Appraisal sponsored by the University of St. Thomas – Opus College of Business to be used as an income course. The board denied this course at the November 25, 2014 meeting as an income course stating there was not enough information provided to determine if it was in fact an income course. Devon Quist provided more details on the income section of this course and is requesting the board take a second look at it. Dave Marhula made a motion to deny, because it has income components but is not an income course; the majority of the material does not appear to be income. Brian Koester seconded the motion. The motion carried.
- ***Devon Quist*** requested the board to review the course description for Financial Management sponsored by the University of St. Thomas – Opus College of Business to be used as an income course. Gary Amundson made a motion to deny, is not an income course. Jane Grossinger seconded the motion. The motion carried.

Closed Meeting

- The board went into a closed meeting at 10:35 am.
- The board resumed their regular meeting at 11:20 a.m.

Reinstatement for Certified Minnesota Assessor

- Paul Grace from the City of Minneapolis requested to have his Certified Minnesota Assessor's license be reinstated. Paul has not been in the assessing field since 2003 and is now employed with the City of Minneapolis. Paul has completed all of the reinstatement requirements except the Assessment Laws & Procedures course; he is scheduled to take the course on January 26 – 29, 2015. Paul would like the board to approve his request with the contingency that he passes the Assessment Laws & Procedures course. Paul has completed the reinstatement application and the FY 2015 renewal application and has paid both fees.

Deb Volkert made the motion that reinstatement requests will be brought to the board after the license has been issued, for informational purposes only. Keith Albertsen seconded. The motion carried.

Application for Certified Minnesota Assessor

- **Samuel Bedard**, Crow Wing County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach and Course 102 – Income Approach to Valuation. Samuel has a Certified Residential Appraiser license number 20344366 counting as 2 ½ years of appraisal experience plus 11 months of assessment experience at Crow Wing County resulting in the maximum experience allowed of three years. If approved, Samuel Bedard will receive a Certified Minnesota Assessor income qualified license.
- **Jodi Kohn**, City of Maple Grove, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since November 2012.
- **Jesse Larson**, Minnesota Department of Revenue, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since January 6, 2014.
- **Lee Leichentritt**, Local Assessor in Hennepin County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since April 2013.

Application for Certified Minnesota Assessor (cont.)

- **Tom Nelson**, Dakota County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Tom has a Certified General Appraiser license number 20531196 counting as 3 years of appraisal experience plus 8 months of assessment experience at Dakota County resulting in the maximum experience allowed of three years.

Brian Koester made a motion to award the Certified Minnesota Assessor license to Samuel Bedard, Jodi Kohn, Jesse Larson, Lee Leichentritt and Tom Nelson effective January 13, 2015. Gary Amundson seconded the motion. The motion carried.

Application for Senior Accredited Minnesota Assessor

- **Christy Miranda**, City of Minneapolis, applied for her SAMA license. Her education includes Assessment Law and Procedures, Bachelor of Science in Real Estate Degree from St. Cloud State University, Basic Income Approach to Value, Income Approach to Valuation, Mass Appraisal Basics, MN Assessment Administration and USPAP. Christy had a successful oral interview with the Board in January 2013. Christy passed the Income Property Case Study Exam in December 2014. Christy has 8 years of assessment experience. Dave Marhula made a motion to award the Senior Accredited Minnesota Assessor license to Christy Miranda. Brian Koester seconded the motion. The motion carried.
- **Duane Scheurer**, Hennepin County, applied for his SAMA license. His education includes Assessment Laws and Procedures, ProSource Appraisal 100 – 104, Mass Appraisal Basics, Basic Income Capitalization, Advanced Income Capitalization, IAAO Assessment Administration, Advanced Application (elective) and USPAP. Duane has a Certified General Resident Appraiser license number 20395572. Duane's Demonstration Form Appraisal report passed the grading committee in October 2014 and he passed the Residential Case Study Exam in October 2014. Duane had a successful oral interview with the Board in November 2014. Duane passed the Income Property Case Study Exam in December 2014. Duane has 5 years of assessment experience. Gary Amundson made a motion to award the Senior Accredited Minnesota Assessor license to Duane Scheurer. Dave Marhula seconded the motion. The motion carried.
- **Lori Thingvold**, Wright County, applied for her SAMA license. Her education includes Assessment Laws, History and Procedures, Residential Appraisal, Mass Appraisal Basics, Basic Income Approach to Value, Income Approach to Valuation, MN Assessment Administration and USPAP. Lori's Demonstration Form Appraisal report passed the grading committee in May 2010 and she passed the Residential Case Study Exam in June 2010. Lori had a successful oral interview with the Board in July 2010. Lori passed the Income Property Case Study Exam in November 2014. Lori has 17 years of assessment experience. Brian Koester made a motion to award the Senior Accredited Minnesota Assessor license to Lori Thingvold. Jane Grossinger seconded the motion. The motion carried.

Appointments with the Board

- **Jean Nelson**, Murray County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws & Procedures, Residential Appraisal Principles, Residential Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach, Income Approach to Valuation, MN Assessment Administration and USPAP. Jean's Demonstration Form Appraisal Report passed the grading committee in September 2014 and she passed the Residential Case Study Exam in September 2014. Jean has 7 years of assessment experience and she applied for the Accredited Minnesota Assessor License. Jane Grossinger made a motion to award the Accredited Minnesota Assessor license to Jean Nelson. Deb Volkert seconded the motion. The motion carried.
- **Joseph Mako**, Hennepin County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws and Procedures, Mass Appraisal Basics, MN Assessment Administration and USPAP. Joseph is a MAI Member and has a Certified General Appraiser license number 4000911. Joseph has 3 years of assessment experience and he applied for the Accredited Minnesota Assessor License. Keith Albertsen made a motion to award the Accredited Minnesota Assessor license to Joseph Mako. Gary Amundson seconded the motion. The motion carried.
- **Terry Johnson**, St. Louis County, met with the Board for his Senior Accreditation Oral Interview. His education includes Assessment Laws, History & Procedures, Appraisal Principles (alternate for course B), Mass Appraisal Basics, Income Approach to Valuation, Income Approach to Valuation II, MN Assessment Administration and USPAP. Terry's Demonstration Form Appraisal Report passed the grading committee in December 2014 and he passed the Residential Case Study Exam in November 2014. Terry passed the Income Property Case Study Exam in January 2015. Terry has 15 years of assessment experience and he applied for the Senior Accredited Minnesota Assessor License. Gary Amundson made a motion to award the Accredited Minnesota Assessor license to Terry Johnson. Brian Koester seconded the motion. The motion carried.
- **Elizabeth Vatsaas**, Scott County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws & Procedures, Basic Appraisal Principles, IAAO Course 101: Fundamentals of Real Property Appraisal, Mass Appraisal Basics, Income Approach to Valuation, General Appraiser Income Approach Part I, MN Assessment Administration and USPAP. Elizabeth's Demonstration Form Appraisal Report passed the grading committee in October 2014 and she passed the Residential Case Study Exam in September 2014. Elizabeth has 7 years of assessment experience and she applied for the Accredited Minnesota Assessor License. Deb Volkert made a motion to award the Accredited Minnesota Assessor license to Elizabeth Vatsaas. Brian Koester seconded the motion. The motion carried.

Discussion Items

- **Form Report Guide and Template:** These documents are currently only available on the member's only secured MAAO website. After some discussion, it was decided that if someone needed these documents to write their form report they will need to pay the MAAO membership fee or ask someone else to print them off.
- **Rule change and policy change:**
 - Deb Volkert made a motion for a rule change stating that all individuals applying for a license or record retention after July 1st are subject to the reinstatement fee. Keith Albertsen seconded the motion. The motion carried.
 - Deb Volkert made a motion to enact a policy change effective for FY 2016. Licenses issued for renewal applications and fees postmarked before Sept 1st will have an effective date of July 1st. Licenses issued for renewal applications and fees postmarked on Sept 1st or after will be effective as of the postmark date. Brian Koester seconded the motion. The motion carried.
- **Revision to AMA (SAMA) Interview Questions Survey:** The board reviewed the new questions and after some discussion it was decided that Gary Amundson would research and develop answers for the new questions.
- **BOA's role in review of licensure courses:** After some discussion, it was decided that examples were needed to decide on guidelines.
- The chairperson set the next meeting date as Tuesday, March 17, 2015 at the St. Michael City Center in St. Michael at 9:30 am.
- Dave Marhula moved to pay the expenses for the meeting. Brian Koester seconded the motion. The motion carried.
- Keith Albertsen moved to adjourn the meeting. Brian Koester seconded the motion. The motion carried.