

**State Board of Assessors
Meeting Minutes
St. Michael City Center
Tuesday, March 17, 2015**

Chairperson Steve Sinell convened the meeting at 9:00 am.

Board members in attendance were:

Keith Albertsen	Brian Koester
Mike Amo	Dave Marhula
Gary Amundson	Steve Sinell
Jane Grossinger	Deb Volkert

Gregg Larson was unable to attend.

Minutes of the January 13, 2015 meeting were reviewed. Keith Albertsen moved to approve the minutes. Brian Koester seconded the motion. The motion carried.

Minutes of the January 13, 2015 closed meeting were reviewed. Jane Grossinger moved to approve the minutes. Dave Marhula seconded the motion. The motion carried. Mike Amo abstained from the motion he did not attend the January meeting.

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–December 31, 2014	15	12	2	1
January 1, 2015 – March 17, 2015	3			3
Passed Reports (7/1/2013 – 3/17/2015)	Received AMA	Have not applied for AMA yet	Received CMAS	Not enough experience
27	15	11	5	1

Updates (cont.)

- The new report required by MS270.41, Subd. 3a was sent to the legislature on January 29, 2015.
- SF 854/HF 951 introduced February 16, 2015.
- Mailed out reappointment letters to all graders of the form report and narrative report on January 28, 2015.
- Newsletters were mailed out to those assessors that did not provide an email address on January 29, 2015.

Approved Continuing Education Hours Requests

- **2015 Annual Residential Real Estate Summit** – Cory Bultema requested CEH's for this summit that will be held on April 9, 2015 and sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **2015 Apartment Summit** – Cory Bultema requested CEH's for this seminar that was held on January 9, 2015 and sponsored by Minnesota Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **2015 Commercial Real Estate Valuation & Appraisal Summit** – Cory Bultema requested CEH's for this seminar that was held on February 6, 2015 and sponsored by Minnesota Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **2015 Development Summit – Downtown St. Paul** – Marvin Deick requested CEH's for this seminar that was held on January 22, 2015 and sponsored by Minnesota Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **Appraisal of Assisted Living Facilities** – Karla Anderson requested CEH's for this seminar which is available online and sponsored by McKissock. The board's continuing education committee approved this request for 8 continuing education hours.
- **Condominium & Townhome Development Summit** – Cory Bultema requested CEH's for this seminar that was held on February 18, 2015 and sponsored by Minnesota Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **Expert Witness for Commercial Appraisers – Subject Matter Electives** – Karla Anderson requested CEH's for this seminar which is available online and sponsored by McKissock. The board's continuing education committee approved this request for 15 continuing education hours.
- **7-Hour USPAP Update** - The board's continuing education committee approved this course for continuing education hours every two years.

Requests for Elective Course

- **Jessi Glancey** requested the board to review the course description for Basic Ag 101 sponsored by MAAO to be used as an elective course and for 15 continuing education hours including a 1 hour exam. Mike Amo made a motion to approve Basic Ag 101 as an elective course. Deb Volkert seconded the motion. The motion carried.

Reinstatement for Certified Minnesota Assessor

- **Scott Schutz**, Anoka County, requested to have his Certified Minnesota Assessor's license be reinstated. Scott met all of the reinstatement requirements on January 29, 2015 when completing Assessment Laws and Procedures. Scott's CMA license was mailed out on February 13, 2015.

Application for Certified Minnesota Assessor

- **Beth Boysen**, Local Assessor working under Kenneth Yager in Wright County, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures, ProSource Appraisal 101 – 104 and Mass Appraisal Basics. Beth has a Certified Residential Appraiser license number 20051979 counting as 2 ½ years of appraisal experience plus 7 months of assessment experience working for a local assessor in Wright County resulting in the maximum experience allowed of three years.
- **Daniel Fasteen**, Hennepin County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Basic Appraisal Principles, Fundamentals of Real Property Appraisal and Fundamentals of Mass Appraisal. Daniel was employed with the City of Fargo Assessor's Office as an Appraiser/Land Management Specialist counting as 4 years of appraisal experience plus 7 months of assessment experience at Hennepin County resulting in the maximum experience allowed of three years.
- **Brian Green**, Dakota County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Appraisal Principles, Basic Valuation Procedures, Mass Appraisal Basics, Basic Income Capitalization and Advanced Income Capitalization. Brian has a Certified General Non Residential Appraiser license number 40415205 counting as 3 years of appraisal experience plus 3 months of assessment experience at Dakota County resulting in the maximum experience allowed of three years. If approved, Brian Green will receive a Certified Minnesota Assessor income qualified license.
- **Wesley Hegna**, Local Assessor working under David Johnson in Hubbard 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 February 2014.

Application for Certified Minnesota Assessor (cont.)

- ***Katrina Herr***, Ramsey County, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures, ProSource Appraisal 101 – 104 and Mass Appraisal Basics. Katrina has a Residential Appraiser Trainee license number 20409532 counting as 1 year of assessment experience plus 9 months of assessment experience at Ramsey County.
- ***Jeremy Kobielush***, Dakota County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, Residential Appraisal Principles, Residential Appraisal Procedures and Fundamentals of Mass Appraisal. Jeremy has a Certified Residential Appraiser license number 40067537 counting as 2 ½ years of assessment experience plus 2 weeks of assessment experience at Dakota County.
- ***Paul Sellwood***, Ramsey County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures, ProSource Appraisal 101 – 104 and Mass Appraisal Basics. Paul has a Certified Residential Appraiser license number 4001678 counting as 2 ½ years of appraisal experience plus 8 months of assessment experience at Ramsey County resulting in the maximum experience allowed of three years.
- ***Katrina Wood***, Crow Wing County, 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 February 2014.

Deb Volkert made a motion to award the Certified Minnesota Assessor license to Beth Boysen, Daniel Fasteen, Brain Green, Wesley Hegna, Katrina Herr, Jeremy Kobielush, Paul Sellwood & Katrina Wood effective March 17, 2015. Brian Koester seconded the motion. The motion carried.

Application for Senior Accredited Minnesota Assessor

- ***Liz Lund***, Roseau County, applied for her SAMA license. Her education includes Assessment Law and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach, Income Approach to Valuation, MN Assessment Administration, IAAO Assessment Administration (elective) and USPAP. Liz's Demonstration Form Appraisal passed the grading committee in May 2013 and she passed the Residential Case Study Exam in August 2013. Liz had a successful oral interview with the Board in November 2013. Liz passed the Income Property Case Study Exam in September 2014. Liz has 5 years of assessment experience. Brian Koester made a motion to award the Senior Accredited Minnesota Assessor license to Liz Lund. Jane Grossinger seconded the motion. The motion carried.

Appointments with the Board

- **10:00 am – Jessi Glancey and Mike Stalberger** requested to meet with the board to discuss standards and competencies, State Board of Assessors course material, review guidelines and the three hour minimum requirement for CEH's . Jessi and Mike reviewed some of the changes being made to courses, instructors and mentorships. The board requested to be kept more informed on the process of curriculum being developed. The board will review the three hour minimum requirement when finalizing proposed rule changes.
- **1:30 pm – Penny Schmit**, Wabasha County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws, History & Procedures; Residential Appraisal; Basic Income Approach to Valuation; Income Approach to Valuation; MN Assessment Administration; and USPAP. Penny's Demonstration Form Appraisal Report passed the grading committee in January 2015 and she passed the Residential Case Study Exam in February 2015. Penny has 20 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 Penny Schmit. Brian Koester seconded the motion. The motion carried.
- **1:50 pm – Amber Hansen**, Murray County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws & Procedures, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation, Income Approach to Valuation, MN Assessment Administration, Residential Modeling Concepts (elective) and USPAP. Amber's Demonstration Form Appraisal Report passed the grading committee in August 2014 and she passed the Residential Case Study Exam in October 2014. Amber has 3 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 Amber Hansen. Brian Koester seconded the motion. The motion carried.
- **2:10 pm – Kay Greenwalt**, Crow Wing County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws, History & Procedures; Residential Appraisal; Basic Income Approach to Value; Income Approach to Valuation; MN Assessment Administration; and USPAP. Kay's Demonstration Form Appraisal Report passed the grading committee in November 2014 and she passed the Residential Case Study Exam in March 2015. Kay has 10 years of assessment experience and she applied for the Accredited Minnesota Assessor License. Keith Albertsen made a motion to award the Accredited Minnesota Assessor license to Kay Greenwalt. Gary Amundson seconded the motion. The motion carried.
- **2:30 pm – Gregg Swartwoudt**, Beltrami County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws, History & Procedures; Fundamentals of Real Property Appraisal; Income Approach to Valuation I; Income Approach to Valuation II; Assessment Administration; and USPAP. Gregg's Demonstration Form Appraisal Report passed the grading committee in March 2015 and he passed the Residential Case Study Exam in October 2014. Gregg has 14 years of assessment experience and he applied for the Accredited Minnesota Assessor License. Brian Koester made a motion to award the Accredited Minnesota Assessor license to Gregg Swartwoudt. Dave Marhula seconded the motion. The motion carried.

Appointments with the Board (cont.)

- **2:50 pm – Peter Yager**, Sherburne County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws, History & Procedures; Residential Appraisal; Basic Income Approach to Value; Income Approach to Valuation; Management & Supervision; and USPAP. Peter's Demonstration Form Appraisal Report passed the grading committee in September 2011 and he passed the Residential Case Study Exam in December 2014. Peter has 14 years of assessment experience and applied for the Accredited Minnesota Assessor License. Brian Koester made a motion to award the Accredited Minnesota Assessor license to Peter Yager. Jane Grossinger seconded the motion. The motion carried.

3:10 pm - Closed Meeting

Deb Volkert made a motion to recess into the closed meeting. Dave seconded the motion. The motion carried.

Discussion Items

- **Board Agenda:** The board established a deadline policy for all requests (applications, courses, etc.) prior to the board meeting. Deb Volkert made the motion that all applications and requests must be in the office no later than 3 business days prior to the board meeting. Dave Marhula seconded. The motion carried.
- **Late License Renewals:** All license renewal applications received on or after September 1st will receive a warning letter the first time it's received late. If an assessor submits a license renewal application on or after September 1st a second time, the assessor will be fined. Renewal applications with a postmark date of September 1 or after are effective as of the postmark date.
- **Newsletter:** The board reviewed a list of topics and decided on the topics to be included in the newsletter.
- **Jurisdiction License Level List:** The board agreed to keep the level of licensure in 2019 the same regardless of statute changes.
- **Proposed Rule Changes:** Tabled until May meeting.
 - Consider rule change to allow the board to establish more than one level of licensure per jurisdiction. (see handout)
 - Consider rule change clarifying MS 270.48, possibly further breakdown of property type
- **Assessment Experience:** What constitutes one year, review current policy. Tabled until the fall meeting.
- **Continuing Education:** The board decided to review and approve most courses for continuing education every 4 year cycle. Courses sponsored by IAAO, MAAO, Appraisal Institute, ASA, ASFMRA, and NAIFA will carryover.
- **Revision to AMA (SAMA) Interview Questions Survey:** Review new questions and answers. Tabled until May meeting.

Discussion Items (cont.)

- **BOA's role in review of licensure courses:** Decide on guidelines needed to move forward with developing criteria for courses, complaints, disciplinary actions, etc. Tabled until May meeting.
- The chairperson set the next meeting date as Tuesday, May 12, 2015 at the St. Michael City Center in St. Michael at 9:00 am.
- Dave Marhula moved to pay the expenses for the meeting. Deb Volkert seconded the motion. The motion carried.
- Brian Koester moved to adjourn the meeting. Jane Grossinger seconded the motion. The motion carried.