

**State Board of Assessors
Meeting Minutes
St. Michael City Center
Tuesday, July 26, 2016**

Chairperson Brian Koester convened the meeting at 9:00am.

Board members in attendance were:

Keith Albertsen	Brian Koester
Gary Amundson	Gregg Larson
Jane Grossinger	Dave Marhula
Reed Heidelberger	Deb Volkert

Charlie Blekre was unable to attend.

Minutes of the May 17, 2016 meeting were reviewed. Dave Marhula moved to approve the minutes as amended. Deb Volkert 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–December 31, 2014	13	11	2	0
January 1, 2015 – June 30, 2015	20	15	5	0
July 1, 2015 – December 31, 2015	14	12	2	0
January 1, 2016 – June 30, 2016	44	38	4	2

Passed Reports (7/1/2013 – 6/30/2016)	Received AMA	Received SAMA	Received CMAS	Have not applied for AMA yet	Not enough experience
93	37	3	8	45	0

Updates (cont.)

- On Thursday, April 28, 2016 the Board emailed out the FY 2017 license renewal announcement to 834 assessors (441 CMA, 39 CMAS, 83 AMA, 246 SAMA and 25 Record Retention). To date, 762 licenses have been renewed and 19 Record Retention.
- On Tuesday, July 12, 2016 an email was sent out to all County Assessors, notifying them that the Fiscal Year 2017 Alphabetical and By County Licensed Assessors list had been posted to the Minnesota State Board of Assessors' website.
- On Friday, July 22, 2016 the renewal application reminder letter was sent out to 44 assessors (28 CMA, 1 CMAS, 3 SAMA & 12 Record Retention) that have not yet renewed their FY 2017 license.
- **Rules Draft and SONAR:** Subcommittee met on Friday, June 24, 2016 to discuss the rules changes.
- **MAAO Education committee update from Brian & Gary:** No conferences until September. The weeklong committee have not met they are working on reorganizing the committees.

Approved Continuing Education Hours Requests

- **Advanced Hotel Appraising – Full Service Hotels** – Ryan Short requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 7 continuing education hours.
- **Appraisal of Land Subject to Ground Leases** – Ryan Short requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 7 continuing education hours.
- **Appraisal of Owner Occupied Commercial Properties** – Karla Anderson requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 7 continuing education hours.
- **Appraisal of Single Tenant Distribution Centers** – Karla Anderson requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 6 continuing education hours.
- **Attic, Insulation, Ventilation and Interior** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 14 continuing education hours.
- **Basic Hotel Appraising – Limited Service Hotels** – Erik Skogquist requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 7 continuing education hours.
- **Environmental Issues for Appraisers** – CEH's were requested for this online course sponsored by McKissock. The board's continuing education committee approved this request for 5 continuing education hours.

Approved Continuing Education Hours Requests (cont.)

- **How to Inspect the Exterior Course** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 16 continuing education hours.
- **How to Inspect Fireplaces, Stoves, and Chimneys** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 4 continuing education hours.
- **How to Inspect HVAC Systems** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 12 continuing education hours.
- **How to Inspect for Moisture Intrusion** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 8 continuing education hours.
- **How to Measure Real Property** – Barbara Olson requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 3 continuing education hours.
- **How to Perform Deck Inspections** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 3 continuing education hours.
- **Independent Fee Appraisers Annual Appraisal Conference** - Susanne Barkalow requested CEH's for this conference that was held on April 26 – 28, 2016 and sponsored by MN Chapter of the National Association of Independent Fee Appraisers. The board approved this request for a minimum of 3 hours to a maximum of 16 continuing education hours.
- **InterNACHI Standards of Practice Course** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 3 continuing education hours.
- **MAAP 2016 Summer Workshop** – Michaelle Cronquist requested CEH's for this workshop that was held on August 18 – 19, 2016 and sponsored by MAAP. The board approved this request for 10 continuing education hours.
- **Residential Plumbing Overview** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 8 continuing education hours.
- **Safe Practices for the Home Inspector** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 4 continuing education hours.
- **Structural Issues for Home Inspectors** – Jan Jackson requested CEH's for this online course sponsored by the International Association of Certified Home Inspectors. The board approved this request for 4 continuing education hours.

Approved Continuing Education Hours Requests (cont.)

- **The Tiny House: Is It A Phase or Craze?** – Mark Anderson requested CEH's for this course that was held on June 17, 2016 and sponsored Kaplan Professional Schools. The board's continuing education committee approved this request for 3.75 continuing education hours.
- **Two Day Advanced Income Capitalization/A** – Eric Bjorklund requested CEH's for this course that was held on June 29 – 30, 2015 and sponsored by the Appraisal Institute. The board approved this request for 15 continuing education hours.

Application for Certified Minnesota Assessor

- **Erin Kastner**, Rice County, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since August 2015. Erin met the one year of assessment experience on August 17, 2016. If approved Erin's CMA license will take effect on August 17, 2016.
- **Kristin Mikula**, Rice County, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures with Ethics, Residential Appraisal Principles, Residential Appraisal Practices, Mass Appraisal Basics, Basic Income Approach to Valuation and Income Approach to Valuation. Kristin has a Certified Residential Appraiser license number 20228006 counting as 2 years of appraisal experience plus 2 years of assessment experience at Rice County which meets the maximum experience allowed of three years. If approved, Kristin will receive a Certified Minnesota Assessor income qualified license.
- **Colleen Pederson**, Swift County, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since July 2013.
- **Jana Wagner**, City of Moorhead, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since July 2013.
- **Craig Walquist**, City of Minneapolis, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures with Ethics, Degree in Real Estate from St. Cloud State University (equivalent to Basic Appraisal Principles, Basic Appraisal Procedures, Elective and Residential Narrative) and Mass Appraisal Basics. Assessment experience since November 2014.

Keith Albertsen made a motion to award the Certified Minnesota Assessor license to Kristin Mikula, Colleen Pederson, Jana Wagner and Craig Walquist effective July 26, 2016 and Erin Kastner effective August 17, 2016. Gary Amundson seconded the motion. The motion carried.

Application for Certified Minnesota Assessor Specialist

- **Steve Christenson**, Douglas County, applied for his Certified Minnesota Assessors Specialist license. His education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation and Income Approach to Valuation. Steve's Demonstration Form Appraisal report passed the grading committee in June 2016. Steve has 2 years of assessment experience.
- **Heather Jacobson**, Otter Tail County, applied for her Certified Minnesota Assessors Specialist license. Her education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation and Income Approach to Valuation. Heather's Demonstration Form Appraisal report passed the grading committee in June 2016. Heather has 4 years of assessment experience.
- **David Johnson**, Local Assessor in Hubbard County, applied for his Certified Minnesota Assessors Specialist license. His education includes Assessment Laws, History and Procedures, Intro to Real Prop 101, Principles of Income Property Appraising 201, Investment and Financial Analysis and Investment Property Appraisal. David was a Certified General Residential Appraiser. David's Demonstration Form Appraisal report passed the grading committee in April 2016. David has 22 years of assessment experience.
- **Gregory Kordosky**, Clay County, applied for his Certified Minnesota Assessors Specialist license. His education includes Assessment Laws and Procedures with Ethics, Kaplan Residential Appraisal 101 – 104 and Mass Appraisal Basics. Basic Income Approach to Valuation and Income Approach to Valuation. David was a Licensed Residential Appraiser. Gregory's Demonstration Form Appraisal report passed the grading committee in March 2016. Gregory has 6 years of assessment experience.
- **Sethrena Simon**, Otter Tail County, applied for her Certified Minnesota Assessors Specialist license. Her education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation and Income Approach to Valuation. Sethrena's Demonstration Form Appraisal report passed the grading committee in June 2016. Sethrena has 2 years of assessment experience.

Dave Marhula made a motion to award the Certified Minnesota Assessor Specialist license to Steve Christenson, Heather Jacobson, David Johnson, Gregory Kordosky and Sethrena Simon effective July 26, 2016. Jane Grossinger seconded the motion. The motion carried.

Application for Senior Accredited Minnesota Assessor

- **Tracy Bauer-Anderson**, City of Brooklyn Park, applied for her Senior Accredited Minnesota Assessors license. Her education includes Assessment Laws and Procedures, ProSource Appraisal 101 – 104, Mass Appraisal Basics, Basic Income Approach to Value, Income Approach to Valuation, MN Assessment Administration and USPAP. Tracy has a Certified Residential Appraiser license number 20252384. Tracy's Demonstration Form Appraisal report passed the grading committee in September 2014 and she passed the Residential Case Study Exam in September 2014. Tracy had a successful oral interview with the Board in November 2014. Tracy passed the Income Property Case Study Exam in September 2015. Tracy has 8 years of assessment experience. Deb Volkert made a motion to award the Senior Accredited Minnesota Assessor license to Tracy Bauer-Anderson. Gary Amundson seconded the motion. The motion carried.
- **Donna House**, Carlton County, applied for her Senior Accredited Minnesota Assessors license. Her education includes Assessment Laws & Procedures, Kaplan Appraisal 101 – 104, Mass Appraisal Basics, Basic Income Approach, Income Approach to Valuation, MN Assessment Administration and USPAP. Donna has a Certified Residential Appraiser License number 20447063. Donna's Demonstration Form Appraisal Report passed the grading committee in May 2015 and she passed the Residential Case Study Exam in May 2015. Donna had a successful oral interview with the Board in May 2015. Donna passed the Income Property Case Study Exam in July 2016. Donna has 7 years of assessment experience. Gary Amundson made a motion to award the Senior Accredited Minnesota Assessor license to Donna House. Dave Marhula seconded the motion. The motion carried.
- **Dan Panka**, Lincoln County, applied for his Senior Accredited Minnesota Assessors license. His education includes Assessment Laws, History and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Value, Income Approach to Valuation, MN Assessment Administration, Property Tax Policy and USPAP. Dan's Demonstration Form Report passed the grading committee in August 2014 and he passed the Residential Case Study Exam in July 2015. Dan had a successful oral interview with the Board in November 2015. Dan passed the Income Property Case Study Exam in July 2016. Dan has 6 years of assessment experience. Dave Marhula made a motion to award the Senior Accredited Minnesota Assessor license to Dan Panka. Gregg Larson seconded the motion. The motion carried.
- **David Parsons**, City of Marshall, applied for his Senior Accredited Minnesota Assessors license. His education includes Assessment Laws, History and Procedures, Residential Appraisal, Mass Appraisal Basics, Basic Income Approach Value, Income Approach to Valuation, IAAO Assessment Administration and USPAP. David's Demonstration Form Appraisal Report passed the grading committee in July 2014 and he passed the Residential Case Study Exam in August 2014. David had a successful oral interview with the Board in November 2014. David passed the Income Property Case Study Exam in April 2016. David has 13 years of assessment experience. Jane Grossinger made a motion to award the Senior Accredited Minnesota Assessor license to David Parsons. Reed Heidelberger seconded the motion. The motion carried.

Appointments with the Board

- **Suzanne Bonnema**, City of Minneapolis, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws, History and Procedures, Residential Appraisal Principles, Basic Valuation Procedures, Mass Appraisal Basics, Basic Income Approach to Value, Basic Income Capitalization, MN Assessment Administration and USPAP. Suzanne's Demonstration Form Appraisal report passed the grading committee in March 2016 and she passed the Residential Case Study Exam in April 2016. Suzanne has 24 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 Suzanne Bonnema. Dave Marhula seconded the motion. The motion carried.
- **Joshua Schoen**, Rice County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws and Procedures, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation, Income Approach to Valuation, MN Assessment Administration, General Appraiser Sales Comparison Approach and USPAP. Joshua's Demonstration Form Appraisal Report passed the grading committee in February 2016 and he passed the Residential Case Study Exam in July 2015. Joshua has 5 years of assessment experience and he applied for the Accredited Minnesota Assessor License. Deb Volkert made a motion to award the Accredited Minnesota Assessor license to Joshua Schoen. Gregg Larson seconded the motion. The motion carried.
- **Jennifer Mansavage**, Pine County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws, History and Procedures, Residential Appraisal, Techniques of Mass Appraisal, Basic Income Approach to Value, Income Approach to Valuation, MN Assessment Administration and USPAP. Jennifer's Demonstration Form Appraisal report passed the grading committee in November 2015 and she passed the Residential Case Study Exam in May 2016. Jennifer has 12 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 Jennifer Mansavage. Gary Amundson seconded the motion. The motion carried.
- **Doug Beise**, Sherburne County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws, History and Procedures, Appraisal Principles, Appraisal Practices, Mass Appraisal Basics, Basic Income Approach to Valuation, Income Approach to Valuation, MN Assessment Administration and USPAP. Doug's Demonstration Form Appraisal Report passed the grading committee in July 2010 and he passed the Residential Case Study Exam in February 2016. Doug has 11 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 Doug Beise. Gary Amundson seconded the motion. The motion carried.

Appointments with the Board (cont.)

- **Gertrude Paschke**, Faribault County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws and Procedures, Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation, Income Approach to Valuation, MN Assessment Administration, Basic Ag 101, Basic Apartment Valuation and USPAP. Gertrude's Demonstration Form Appraisal Report passed the grading committee in March 2016 and she passed the Residential Case Study Exam in May 2016. Gertrude has 5 years of assessment experience and she applied for the Accredited Minnesota Assessor License. Gregg Larson made a motion to award the Accredited Minnesota Assessor license to Gertrude Paschke. Dave Marhula seconded the motion. The motion carried.
- **Mike Splonskowski**, Local Assessor in Becker County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws and Procedures, Residential Appraisal Principles, Residential Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Valuation, Income Approach to Valuation, IAAO Assessment Administration, General Appraiser Report Writing & Case Studies and USPAP. Mike's Demonstration Form Appraisal Report passed the grading committee in August 2012 and he passed the Residential Case Study Exam in September 2012. Mike has 6 years of assessment experience and he applied for the Accredited Minnesota Assessor License. Gary Amundson made a motion to award the Accredited Minnesota Assessor license to Mike Splonskowski. Keith Albertsen seconded the motion. The motion carried.
- **Brian House**, Carlton County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws, History and Procedures, Kaplan Appraisal 101 – 104, Mass Appraisal Basics, Basic Income Approach to Valuation, Income Approach to Valuation, MN Assessment Administration and USPAP. Brian's Demonstration Form Appraisal Report passed the grading committee in May 2015 and he passed the Residential Case Study Exam in April 2016. Brian has 8 years of assessment experience and he applied for the Accredited Minnesota Assessor License. Gregg Larson made a motion to award the Accredited Minnesota Assessor license to Brian House. Dave Marhula seconded the motion. The motion carried.

Discussion Items

- **Trainee Registration:** When the rule changes take effect and the trainee registration is available the following policies will be effective.
 - Keith Albertsen made a motion that all individuals who have not been previously licensed and who view property and collect data must register as a trainee and become licensed within three years. Gregg Larson seconded the motion. The motion carried.
 - Deb Volkert made a motion that individuals who have been previously licensed may not register as a trainee and may not view property or collect data unless they reinstate their license. Dave Marhula seconded the motion. The motion carried.

- **Attendance at Licensure Courses that cannot be challenged:** The board discussed required attendance at the two licensure courses that cannot be challenged. The President of MAAO, Nancy Wojcik was notified via email and asked to inform the instructors of these courses and any other persons necessary to ensure adherence.

- **Challenge Exams and Seat Time:** The board reviewed other sponsoring organizations policies for challenging exams, seat time and attendance of licensure courses.

Keith Albertsen made a motion that the board will accept challenges of fifteen hour licensure courses. Jane Grossinger seconded the motion. The motion carried.

- **Request for Continuing Education Hours in the last year of the 4-year cycle:** The board discussed the pros and cons of reviewing requests for continuing education in the last year of a 4-year cycle.

Gary Amundson made a motion that the board will not consider or approve courses for continuing education hours for individuals who have already met their required number of hours. Deb Volkert seconded the motion. The motion carried.

- **Revision to AMA (SAMA) Interview Questions Survey:** Review the revised list. Evaluate new questions that were added for the past two meetings. Tabled for September meeting.

- **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 for September meeting.

The chairperson set the next meeting date as Tuesday, September 20, 2016 at the St. Michael City Center in St. Michael at 9:00 am.

Deb Volkert made a motion to pay the expenses for the meeting. Gregg Larson seconded the motion. The motion carried.

Dave Marhula made a motion to adjourn the meeting. Keith Albertsen seconded the motion. The motion carried.