

**State Board of Assessors  
Meeting Minutes  
St. Michael City Center  
Tuesday, September 20, 2016**

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

Board members in attendance were:

Keith Albertsen	Brian Koester
Gary Amundson	Gregg Larson
Charlie Blekre	Dave Marhula
Jane Grossinger	Deb Volkert
Reed Heidelbergger	

Dave Marhula made a motion to approve the September 20, 2016 meeting agenda. Charlie Blekre seconded the motion. The motion carried.

Minutes of the July 26, 2016 meeting were reviewed. Jane Grossinger moved to approve the minutes as amended. Reed Heidelbergger 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
July 1, 2016 – September 20, 2016	21	14	3	4

  

Passed Reports (7/1/2013 – 9/20/2016)	Received AMA	Received SAMA	Received CMAS	Have not applied for AMA yet	Not enough experience
104	42	3	12	48	0

## **Updates (cont.)**

- There are 782 Assessors licensed for FY 2017. 405 CMA, 38 CMAS, 86 AMA & 253 SAMA. 24 assessors are on Record Retention (number not included in the total number of assessors).
- There are 83 assessors that have not renewed their license from FY 2016. 17 assessors have not contacted us to report what they will be doing for FY 2017. The other 66 assessors are either retired (49), moved out of state, pursuing other careers or need to fulfil their CEH requirements before renewing for FY 2017.
- **Assessor Renewal History:** The board reviewed the historical documentation of how many assessors renewed their license from fiscal year 2000 through fiscal year 2017. The numbers have varied over the years; the highest number of renewals received was 910 in fiscal year 2007, the lowest number of renewals received was 762 in fiscal year 2017.
- **Assessor by Age Report:** The age report is now posted on the board's website.
- **Discuss Proposed 2017 Board Meeting Schedule:** The proposed 2017 Board meeting schedule has been confirmed and can be found on the board's website.
- **Rule Draft & Sonar Update:** Deb reviewed the revisions made by the Department of Revenue's Legal Division with the board members.
- **MAAO Education committee update from Brian & Gary:** Week long courses are being updated and Mass Appraisal Basics is being rewritten. They are looking for a new venue for courses that are held in Plymouth, MN.

## **Approved Continuing Education Hours Requests**

- **2016 Hotel & Hospitality Conference** – Cory Bultema requested CEH's for this conference that was held on September 9, 2016 and sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **2015 Right of Way Conference** – Bob Seado requested CEH's for this conference that was held on September 23 – 25, 2015 and sponsored by the MN Department of Transportation, Office of Land Management. The board's continuing education committee approved this request for 9 continuing education hours.
- **2016 MAAO Fall Conference** – Tami Paulson requested CEH's for this conference being held on September 25 – 28, 2016 and sponsored by MAAO. The board's continuing education committee approved this request for the number of continuing education hours identified on the seminar description sheet.
- **Appraising Distinctive Residential Properties** – Jill Brenna requested CEH's for this seminar that was held on July 14, 2016 and sponsored by Kaplan Professional Schools. The board's continuing education committee approved this request for 7.5 continuing education hours.
- **Appraising Small Apartment Properties** – Tom ErnsteReineke requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 6 continuing education hours.

### Approved Continuing Education Hours Requests

- **Owatonna Micropolitan Real Estate Summit** – William Effertz requested CEH's for this summit being held on October 13, 2016 and sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **Regression Analysis: Proving Beyond a Shadow of a Doubt**– Jill Brenna requested CEH's for this seminar that was held on August 6, 2016 and sponsored by Kaplan Professional Schools. The board's continuing education committee approved this request for 7.5 continuing education hours.

### Requests for Elective Course

- **Mary Wells** is requesting the board to consider courses she took at Augsburg College to be used as an elective course.

Jane Grossinger made a motion to approve statistics courses from any accredited college or university as an elective course. Gregg Larson seconded the motion. The motion carried.

### Requests for Income Course

- **Scott deLambert** is requesting the board to review the course description for REA 456 – Real Estate Investments taken at Arizona State University to be used as an income course.

Reed Heidelberger made a motion to deny the request based on lack of course details. Gregg Larson seconded the motion. The motion carried.

### Application for Certified Minnesota Assessor

- **Scott deLambert**, Hennepin County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures with Ethics, Degree in Real Estate from Arizona State University (equivalent to Basic Appraisal Principles, Basic Appraisal Procedures, Elective and Residential Narrative) and Mass Appraisal Basics. Scott has a Certified General Appraiser license number 4002687 (equivalent to Principles, Procedures, Elective, two income & 15-hour USPAP) counting as 3 years of appraisal experience plus 11 months of assessment experience at Hennepin County which meets the maximum experience allowed of three years. If approved, Scott will receive a Certified Minnesota Assessor income qualified license.
- **Bill Downs**, St. Louis County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since July 2014.
- **Rachel Jacobs**, Rock 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 2015.
- **Ryan Johnson**, Carver County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since June 2015.

### **Application for Certified Minnesota Assessor (cont.)**

- **Cynthia Large**, Mahnommen 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 June 2015.
- **Judy Lazar**, Ramsey County, applied for the Certified Minnesota Assessor license. Her education includes Assessment Laws and Procedures with Ethics, Certified Residential Appraiser license (equivalent to Basic Appraisal Principles, Basic Appraisal Procedures, Elective and 15-Hour USPAP course) and Mass Appraisal Basics. Judy's Certified Residential Appraiser license number 40464487 counts as 2 ½ years of appraisal experience plus 10 months of assessment experience at Ramsey County which meets the maximum experience allowed of three years.
- **Henry Ndawula**, Washington County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures with Ethics, Degree in Real Estate from University of St. Thomas (equivalent to Basic Appraisal Principles, Basic Appraisal Procedures, Elective and Residential Narrative), Mass Appraisal Basics, Real Estate Finance & Investment and Commercial Real Estate Valuation. Assessment experience since August 2015. If approved, Henry will receive a Certified Minnesota Assessor income qualified license.
- **Brian Pitzer**, Wabasha County, applied for the Certified Minnesota Assessor license. His education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures and Mass Appraisal Basics. Assessment experience since October 2015. Brian will meet the one year of assessment experience on October 4, 2016. If approved Brian's CMA license will take effect on October 4, 2016.
- **Tracy Pooler**, Wabasha 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 September 2015.
- **Anne Sims**, St. Louis 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 2014.
- **Dawn Swisher**, Otter Tail 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.
- **Renae Szymanski**, Mille Lacs 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 September 2015. Tracy will meet the one year of assessment experience on September 21, 2016. If approved Tracy's CMA license will take effect on September 21, 2016.

### **Application for Certified Minnesota Assessor (cont.)**

- **Der Thao**, Department of Revenue, 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 October 2015. Der will meet the one year of assessment experience on October 21, 2016. If approved Der's CMA license will take effect on October 21, 2016.

Dave Marhula made a motion to award the Certified Minnesota Assessor license to Scott deLambert, Bill Downs, Rachel Jacobs, Ryan Johnson, Cynthia Large, Judy Lazar, Henry Ndawula, Tracy Pooler, Anne Sims, Dawn Swisher, effective September 20, 2016, Renae Szymanski effective September 21, 2016, Brian Pitzer effective October 4, 2016 and Der Thao effective October 21, 2016 . Gary Amundson seconded the motion. The motion carried.

### **Application for Certified Minnesota Assessor Specialist**

- **Tyler Synstelien**, Otter Tail 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. Basic Income Approach to Valuation and Income Approach to Valuation. Tyler's Demonstration Form Appraisal report passed the grading committee in August 2016. Tyler has 2 years of assessment experience. Deb Volkert made a motion to award the Certified Minnesota Assessor Specialist license to Tyler Synstelien. Reed Heidelberger seconded the motion. The motion carried.

### **Application for Senior Accredited Minnesota Assessor**

- **Suzanne Bonnema**, City of Minneapolis, applied for her Senior Accredited Minnesota Assessors license. 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 had a successful oral interview with the Board in July 2016. Suzanne passed the Income Property Case Study Exam in September 2016. Suzanne has 24 years of assessment experience. Keith Albertsen made a motion to award the Senior Accredited Minnesota Assessor license to Suzanne Bonnema. Gregg Larson seconded the motion. The motion carried.
- **John Mott**, Hennepin County, applied for his Senior Accredited Minnesota Assessors license. His education includes Assessment Laws & Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Basic Income Approach to Value, Income Approach to Valuation, MN Assessment Administration, Residential Modeling Concepts and USPAP. John's Demonstration Form Report passed the grading committee in November 2015 and he passed the Residential Case Study Exam in February 2016. John had a successful oral interview with the Board in May 2016. John has 5 years of assessment experience. John is taking the Income Property Case Study Exam workshop and exam on September 28 & 29, 2016. John is requesting the board to approve his SAMA license request contingent on passing the Income Property Case Study Exam. Gary Amundson made a motion to award the Senior Accredited Minnesota Assessor license to John Mott with the stipulation that he passes the Income Case Study Exam on September 29, 2016. Jane Grossinger seconded the motion. The motion carried.

## Appointments with the Board

- **Assessor Leadership Class:** Andrea Fish updated the board on the progress for the Assessor Leadership classes. Changing the structure from a four two-day module to four one-day module. Five people working on creating the curriculum for these modules. The modules will be offered the first week in December. The curriculum will be sent to the board for approval for continuing education hours.
- **Todd Smith**, Cook County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Law and Procedures, Residential Appraisal, Mass Appraisal Basics, Basic Income Approach to Value, Investment Property Appraisal & Investment and Fiscal Analysis, MN Assessment Administration and USPAP. Todd's Demonstration Form Report passed the grading committee in July 2012 and he passed the Residential Case Study Exam in September 2016. Todd had a Certified Residential Appraiser license number 20137495. Todd has 26 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 Todd Smith. Dave Marhula seconded the motion. The motion carried.
- **John Conway**, Winona County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Income Approach to Valuation, Basic Income Approach to Valuation, MN Assessment Administration and USPAP. John's Demonstration Form Appraisal Report passed the grading committee in February 2016 and he passed the Residential Case Study Exam in July 2016. John has 8 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 John Conway. Gregg Larson seconded the motion. The motion carried.
- **Gianna Olson**, Hennepin County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Law and Procedures, ProSource Residential Appraisal 101 – 104, General Appraiser Income Approach Part I, General Appraiser Income Approach Part II, MN Assessment Administration and USPAP. Gianna's Demonstration Form Report passed the grading committee in April 2016 and she passed the Residential Case Study Exam in May 2016. Gianna had a Certified Residential Appraiser license number 20583245. Gianna has 9 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 Gianna Olson. Dave Marhula seconded the motion. The motion carried.
- **Jon Hicks**, City of Minneapolis met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws & Procedures with Ethics, Bachelor's Degree in Real Estate from St. Cloud State University (equivalent to Basic Appraisal Principles, Basic Appraisal Procedures, Elective and Residential Narrative), Mass Appraisal Basics, General Appraiser Income Approach Part 1, General Appraiser Income Approach Part 2, MN Assessment Administration and USPAP. Jon has a Certified General Appraiser license number 40064074. John has 3 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 Jon Hicks. Dave Marhula seconded the motion. The motion carried.

### **Appointments with the Board (cont.)**

- **Lori Bistodeau**, Sherburne County, met with the Board for her Accreditation Oral Interview. Her education includes Assessment Laws and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Mass Appraisal Basics, Income Approach to Valuation, Basic Income Approach to Valuation, MN Assessment Administration, Boundary Controls & Legal Principles I & II and USPAP. Lori's Demonstration Form Appraisal Report passed the grading committee in July 2015 and she passed the Residential Case Study Exam in August 2016. Lori has 5 years of assessment experience and she applied for the Accredited Minnesota Assessor License. Reed Heidelberger made a motion to award the Accredited Minnesota Assessor license to Lori Bistodeau. Gary Amundson seconded the motion. The motion carried.
- **Matt Sandell**, City of Minneapolis, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws, History and Procedures with Ethics, Basic Appraisal Principles, Basic Appraisal Procedures, Techniques of Mass Appraisal, Income Approach to Valuation, Basic Income Approach to Valuation, MN Assessment Administration and USPAP. Matt's Demonstration Form Appraisal Report passed the grading committee in April 2016 and he passed the Residential Case Study Exam in July 2016. Matt has 11 years of assessment experience and he applied for the Accredited Minnesota Assessor License. Dave Marhula made a motion to award the Accredited Minnesota Assessor license to Matt Sandell. Gregg Larson seconded the motion. The motion carried.
- **Tom Carruth**, Dakota County, met with the Board for his Accreditation Oral Interview. His education includes Assessment Laws and Procedures with Ethics, Kaplan Residential Appraisal 101 – 104, Mass Appraisal Basics, Income Approach to Valuation, Basic Income Approach to Valuation, MN Assessment Administration and USPAP. Tom's Demonstration Form Appraisal Report passed the grading committee in April 2016 and he passed the Residential Case Study Exam in July 2016. Tom has 8 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 Tom Carruth. Dave Marhula seconded the motion. The motion carried.

## Discussion Items

- **Assessment Experience Policies:** The board reviewed the reinstatement experience policy and added the following: Reinstatement after 10 years is considered an initial assessors license.
- **Define Fee Appraiser Licenses:** The following fee appraiser licenses are equivalent to the corresponding education requirements.
  - **Trainee Real Property Appraiser:** is equal to Residential Appraisal Principles, Residential Appraisal Procedures and 15 hour USPAP course.
  - **Licensed Residential Real Property Appraiser:** is equal to Residential Appraisal Principles, Residential Appraisal Procedures, Elective and 15 hour USPAP course.
  - **Certified Residential Real Property Appraiser:** is equal to Residential Appraisal Principles, Residential Appraisal Procedures, Elective and a 15 hour USPAP course.
  - **Certified General Real Property Appraiser:** is equal to Residential Appraisal Principles, Residential Appraisal Procedures, Elective, 2 Income Courses and 15 hour USPAP course.

Dave Marhula made a motion to approve the fee appraiser's education equivalent to the corresponding assessor education requirements. Keith Albertsen 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 November 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 November meeting.

The chairperson set the next meeting date as Tuesday, November 15, 2016 & Wednesday, November 16, 2016 at the St. Michael City Center in St. Michael at 9:00 am.

Keith Albertsen made a motion to pay the expenses for the meeting. Dave Marhula seconded the motion. The motion carried.

Charlie Blekre made a motion to adjourn the meeting. Jane Grossinger seconded the motion. The motion carried.