

**State Board of Assessors  
Meeting Minutes  
St. Michael City Center  
Tuesday, January 15, 2019**

Chairperson Gregg Larson convened the meeting at 9:00am.

Board members in attendance:

Gary Amundson	Reed Heidelberger
Charlie Blekre	Joy Kanne
Andrea Fish	Gregg Larson
Jane Grossinger	Lori Schwendemann

Mike Reed was unable to attend.

Agenda for the January 15, 2019 meeting were reviewed. Jane Grossinger moved to approve the agenda. Lori Schwendemann seconded the motion. The motion carried.

Minutes of the November 20, 2018 meeting were reviewed. Reed Heidelberger moved to approve the minutes. Charlie Blekre seconded the motion. The motion carried.

### **Election of Officers**

- **Nomination for Vice Chair:** Reed Heidelberger made a motion to nominate Gary Amundson for vice chair. Joy Kanne seconded the nomination. The motion carried. Gary Amundson is the vice chair for 2019.
- **Nomination for Chair:** Reed Heidelberger made a motion to nominate Gregg Larson as chair. Joy Kanne seconded the nomination. The motion carried. Gregg Larson is the chair for 2019.

### **Grading Committee Appointments**

- **Form Report Grading Committee:** Gary Amundson made a motion to reappoint and appoint the following form report committee members; Tamara Anderson, Patrick Chapman as chair, Kyle Holmes, Kim Jensen, Keith Kern, Rebecca Malmquist, Ann Miller, Nate Stulc, Patrick Todd, and Bob Wilson. Newly appointed form report graders; Tom Brandt and Judy Lazar. Reed Heidelberger seconded the motion. The motion carried.
- **Narrative Grading Committee:** Reed Heidelberger made a motion to reappoint narrative committee members Kim Jensen, Rebecca Malmquist, and Bob Wilson as chair. Lori Schwendemann 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	13	13	0	0
July 1, 2014–December 31, 2014	13	13	0	0
January 1, 2015 – June 30, 2015	15	15	0	0
July 1, 2015 – December 31, 2015	13	12	1	0
January 1, 2016 – June 30, 2016	33	33	0	0
July 1, 2016 – December 31, 2016	26	25	1	0
January 1, 2017 – June 30, 2017	19	18	1	0
July 1, 2017 – December 31, 2017	9	9	0	0
January 1, 2018 – June 30, 2018	18	16	2	0
July 1, 2018 – December 31, 2018	12	8	3	1
January 1, 2019 – January 15, 2019	0	0	0	0
Passed Reports (7/1/2013 – 11/20/2018)	Received AMA	Received SAMA	Received CMAS	Have not applied for AMA
165	110	11	6	32

## Updates (cont.)

- **Outside Activity Letters:** 47 Assessors indicated on their FY 2019 license application that they were engaged in one or more activities other than assessment work during the period from July 1, 2017 to June 30, 2018. 81 employers were sent the outside activity letter.
- **Rule Changes:** There were less than 25 complaints from the Notice of Intent to Adopt Rules. The Intent to Adopt Rules paperwork is being put together and will be sent to the Office of Administrations for review.
- **MAAO Education Committee update from Gary Amundson:** Joy, Jessi, and Gary met about the standards, passed them along to assessors for review. Once they come back, the committee will move them out to a larger audience.

### **Approved Continuing Education Hours Requests**

- **2018 Industrial & Economic Development:** Earl Zent requested CEH's for this seminar that was held on November 15, 2018 in Golden Valley, MN sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **2018 Office Summit – Developing, Leasing & Investment Trends:** Earl Zent requested CEH's for this summit that was held on December 7, 2018 in Golden Valley, MN sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **2019 Apartment Summit:** Scott Lyons requested CEH's for this summit that will be held on January 11, 2019 in Bloomington, MN sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **Commercial Real Estate Valuation & Appraisal Forecast Summit:** Earl Zent requested CEH's for this summit that was held on January 18, 2019 in Golden Valley, MN sponsored by MN Real Estate Journal. The board's continuing education committee approved this request for 4 continuing education hours.
- **Real Estate Math:** Vanessa Thompson requested CEH's for this online class sponsored by Kaplan Professional Schools. The board's continuing education committee approved this request for 3 continuing education hours.
- **Residential Site Valuation & Cost Approach:** Kari Theisen requested CEH's for this course that will be held on March 6 - 7, 2019 in Roseville, MN sponsored by Appraisal Institute. The board's continuing education committee approved this request for 15 continuing education hours (including a 1 hour exam).
- **The Basics of Expert Witness for Commercial Appraisers:** Chris Bennett requested CEH's for this online course sponsored by McKissock. The board's continuing education committee approved this request for 7 continuing education hours.

### **Denied Continuing Education Hours Requests**

**Ehlers Annual Public Finance Seminars:** Elizabeth Diaz requested CEH's for these seminars that was held on February 7 - 8, 2019 in Brooklyn Center, MN sponsored by Ehlers & Associates. The board's continuing education committee denied this request for 5 continuing education hours. The consensus was there was not enough relevant instructions to benefit an assessor.

### **Request for Elective Course Approval**

**Residential Site Valuation & Cost Approach:** This course was submitted for continuing education hours, the CEH committee felt the board should review this course as an elective course. Because this course has 14 hours of instruction with a 1 hour exam it will be considered as a half elective course. Appraisal Institute will be offering this half elective course in the classroom in March 2019 and as an online course. Andrea Fish moved to approve the Residential Site Valuation & Cost Approach course as a ½ Elective course. Reed Heidelberger seconded the motion. The motion carried.

### **Review Licensure Courses**

Appraisal Institute will be teaching the Basic Appraisal Principles and Basic Appraisal Procedures courses in the future for MAAO. The board reviewed the documents Appraisal Institute sent over for these two courses, the board agreed that these courses meet the requirements as a licensure course.

### **Applications for Certified Minnesota Assessor**

Jane Grossinger made a motion to award the Certified Minnesota Assessor license to the following individual.

**Lisa Glass**, Minnesota Department of Revenue

Lori Schwendemann seconded the motion. The motion carried.

### **Applications for Accredited Minnesota Assessor**

Andrea Fish made a motion to award the Accredited Minnesota Assessor license to the following individual.

**Jonathan Packer**, Ramsey County

Jane Grossinger seconded the motion. The motion carried.

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

**Laura Odgren**, Martin County

Gary Amundson seconded the motion. The motion carried.

Andrea Fish made a motion to award the Accredited Minnesota Assessor license to the following individual.

**Lorri Houtsma**, Pine County

Jane Grossinger seconded the motion. The motion carried.

Gary Amundson made a motion to award the Accredited Minnesota Assessor license to the following individual.

**Lisa Clarke**, City of St. Louis Park

Reed Heidelberger seconded the motion. The motion carried.

Andrea Fish made a motion to award the Accredited Minnesota Assessor license to the following individual.

**Tammy Mortenson**, Chippewa County

Lori Schwendemann seconded the motion. The motion carried.

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

Jane Grossinger made a motion to award the Senior Accredited Minnesota Assessor license to the following individual:

**Gina Sievert**, Sibley County

Reed Heidelberger seconded the motion. The motion carried.

Reed Heidelberger made a motion to invite Karla Ambrose to return for a third oral interview. Joy Kanne seconded the motion. The motion carried.

### **10:00 am – Closed Meeting**

Reed Heidelberger made a motion to recess into the closed meeting. Charlie Blekre seconded the motion. The motion carried. Following the closed session, the board reconvened in open session.

Gary Amundson, vice-chair, reported in open session that after long deliberation the board approved a Stipulation Consent agreement. The consent order provided 30 day suspension for former Martin County Assessor Dan Whitman that is stayed for 12 months. The Stipulation Agreement was mailed to Dan Whitman's attorney on January 16, 2019.

**Complaint Process:** After the board discussed the length of time it took to finalize the most recent complaint, the board discussed concerns with the complaint and investigation process and timelines, including the involvement of the Commissioner of Revenue and the Property Tax Division at the Department of Revenue. Charlie Blekre made a motion to request the Commissioner and Property Tax Division to complete their investigative reports and issue their findings within 6 months of receiving the complaint. Reed Heidelberger seconded the motion. The motion carried.

### **Appointments with the Board**

Jackie Coulter, MAAO Education Coordinator, provided a course registration and results report for past courses from 2017 thru 2018 and course registrations for 2019 for the board to review. Jackie reported that MAAO will be co-sponsoring with Appraisal Institute for the Basic Appraisal Principles and Basic Appraisal Procedures courses in 2019. The students will register through Appraisal Institute and as long as they are a MAAO member they get the discount that was negotiated with Appraisal Institute. Jackie also reported that MAAO decided to stop offering the Basic Income Approach course after this year because the committee found it was very similar to the IAAO Income Approach course. MAAO will be offering the IAAO 102 Income Approach to Valuation and the IAAO 112 Income Approach to Valuation II in the near future. The board asked about MAAO's retake exam policy; Jackie stated that MAAO's re-examination policy allows a student to retest any MAAO sponsored course one time only if he/she fails the final exam during the course. Re-examinations must be completed within 90 days of the course. The student has to reach out to a MAAO proctor to set up a date and time to retake the exam, there are proctors located all over the state. Jackie stated that MAAO has a lot of course options this year with more electives for AMA options.

## **Discussion Items**

- **Certificate of the Board of Assessors - Resolution Adopting Rules:** The board reviewed a certificate authorizing a board member to do the following: sign the Order Adopting Rules, modify the rules as needed to obtain the Revisor of Statutes or the Administrative Law Judge's approval of the rules, and to perform other necessary acts to give the rules the force and effect of law. Reed Heidelberger made a motion to give Executive Secretary Andrea Fish the authority. Joy Kanne seconded the motion. The motion carried.
- **Adoption of the Rule Amendments:** The board reviewed the official Ordering Adopting Rules document that Andrea Fish will sign once the rules are adopted.
- **Licensure Courses:** The board discussed creating a 5 year plan to review all approved licensure courses. A timeline and list of courses will be prepared to review at the March 12, 2019 board meeting.
- **Assessment Experience:** The board reviewed the First Year Exposure Checklist. Andrea Fish made a motion to approve the final version of the First Year Exposure Checklist with changes. Gary Amundson seconded the motion. The motion carried.
  - The following experience policies were created for Reciprocity & Minnesota Department of Commerce Fee Appraisers.
    - Andrea Fish made a motion that reciprocity (out of state) assessment experience will receive one year of Minnesota assessment experience. Reed Heidelberger seconded the motion. The motion passed.
    - Jane Grossinger made a motion that Minnesota Department of Commerce Fee Appraisers will receive one year of assessment experience. Reed Heidelberger seconded the motion. The motion carried.
- **Oral Interview Questions:** Review interview questions. Tabled for future meeting.

The chairperson set the next meeting date as Tuesday, March 12, 2019 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. Jane Grossinger seconded the motion. The motion carried.

Reed Heidelbergger made a motion to adjourn the meeting. Charlie Blekre seconded the motion. The motion carried.