

**State Board of Assessors  
Meeting Minutes  
Holiday Inn St. Cloud  
Tuesday, May 21, 2019**

Chairperson Gregg Larson convened the meeting at 8:30am.

Board members in attendance:

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

Joy Kanne was unable to attend.

Agenda for the May 21, 2019 meeting were reviewed. Gary Amundson moved to approve the agenda. Reed Heidelberger seconded the motion. The motion carried.

Minutes of the March 12, 2019 meeting were reviewed. Reed Heidelberger moved to approve the minutes. Mike Reed 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	11	8	3	0
January 1, 2019 – May 21, 2019	11	7	4	0
Passed Reports (7/1/2013 – 05/21/2019)	Received AMA	Received SAMA	Received CMAS	Have not applied for AMA
187	118	12	6	31

## Updates (cont.)

- **Newsletter:** The April newsletter was sent out via email on April 25, 2019 to 874 assessors. Two newsletters were sent in the mail to those assessors without an email address.
- **Rule Changes:** Adoption of Permanent Rule Governing Licensure, Education, Trainee Registration, Record Retention, and Reinstatement; Amending Minn. Rules, Chapter 1950; changes were made to the rules pertaining to the State Board of Assessors and officially adopted on April 8, 2019. These changes take effect for the licensing cycle beginning on July 1, 2016.
- **Policy Updates:** All of the policies affected by the rules changes were updated on the policy document and posted to the board's website. The Course B policy was removed from the policy document.
- **Compatibility of Offices – Elected or Appointed:** The most updated list of all compatibility of offices for elected or appointed positions for county and local assessors has been posted on the board's website on the policy page.
- **Mission Statement for the Oral Interview:** The mission statement the board created has been added to the SAMA requirements document.
- **Oral Interview Questions:** The board's new oral interview questions for the SAMA oral interviews have been put in the board members' binders.
- **Trainee Registrations:** Since the rule changes were adopted on April 8, 2019 and the new Trainee Registration became a requirement; there have been 35 Trainee applications submitted.
- **MAAO Education Committee update from Gary Amundson:** The committee met Friday, May 17<sup>th</sup>, and discussed creating an accelerated income course and second Ag course for the future. The committee worked most of the day on the standards that related more to leadership and technical, and will launch the standards at the MAAO fall conference.

## Approved Continuing Education Hours Requests

- **2019 MAAO Summer Seminars:** Kim Jensen requested CEH's for this conference that was held on May 22-23, 2019 in St. Cloud, MN sponsored by MAAO. The board's continuing education committee approved this request for 4-7 hours of continuing education hours.
- **Business Practices & Ethics:** Brett Hall requested CEH's for this course that will be offered throughout the year in various locations and sponsored by North Star Chapter of the Appraisal Institute. The board's continuing education committee approved this request for 6 hours of continuing education hours.
- **Market Pulse - What's Trending Now:** Robert Stewart requested CEH's for this seminar that was held on March 12, 2019 in St. Cloud, MN sponsored by Kaplan Real Estate. The board's continuing education committee approved this request for 7.5 hours of continuing education hours.

### **Approved Continuing Education Hours Requests (cont.)**

- **MSA Public Employee Safety Training:** Lisa Strand requested CEH's for this seminar that was held on April 25, 2019 in Madison, MN sponsored by Minnesota Sheriffs' Association (MSA). The board's continuing education committee approved this request for 3 hours of continuing education hours.
- **Where Did That Number Come From? Supporting Value Conclusions for Assessments, Appeals & Tax Court:** Brett Hall requested CEH's for this seminar that will be held in Minneapolis, MN sponsored by Hennepin County Assessor's Office. The board's continuing education committee approved this request for 3 hours of continuing education hours.

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

- **30 Hour Broker Course:** Traci Balder requested CEH's for this course sponsored by Kaplan Real Estate for 30 continuing education hours. The consensus was that there was not 30 hours of relevant instructions to benefit an assessor.

### **Review Courses for Income Narrative**

Bill Toelke is requesting the board to review the General Demonstration Report – Capstone Program to be considered as equivalent to the Income Narrative. Reed Heidelberger made a motion to approve as equivalent to an Income Narrative. Gary Amundson seconded the motion. The motion carried with 1 nay.

### **Review Assessment Experience**

Bill Toelke is requesting the board to review his work experience at Dakota County to determine how many years of assessment experience he will be granted for his initial assessor's license. Gary Amundson made a motion to approve 3 years of assessment experience. Mike Reed seconded the motion. The motion carried with 1 nay.

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

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

**Amanda Johnston**, Crow Wing County  
**Andrea Nadeau**, Pope County (effective July 1, 2019)  
**Melissa Voigt**, Meeker County (effective July 1, 2019)  
**Paul Winghart**, Minnesota Department of Revenue

Andrea Fish seconded the motion. The motion carried.

### **Applications for Temporary Minnesota Assessor**

Gary Amundson made a motion to award the Temporary Minnesota Assessor license to the following individuals.

**Michael Bownik**, Ramsey County (effective July 1, 2019)  
**Teresa Cornellison**, Hennepin County

Reed Heidelberger seconded the motion. The motion carried.

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

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

**Whitney Benson**, Beltrami County

**Thomas Goedken**, Olmsted County

**Wesley Hegna**, Local Assessor in Becker, Beltrami & Hubbard Counties

**David Johnson**, Local Assessor in Becker & Hubbard Counties

**Darin Katzenmeyer**, Local Assessor in Hubbard County

**Paul Sellwood**, Ramsey County

**Jonathan Springer**, Stearns County

**Robert Thompson**, Cook County

Gary Amundson seconded the motion. The motion carried.

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

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

**Jeffrey Faust**, Hennepin County

**Brian House**, Carlton County

**Corey Schwartz**, Le Sueur County (effective July 1, 2019)

**Tyler Synsteliën**, Otter Tail County

Gary Amundson seconded the motion. The motion carried.

### **Appointments with the Board**

**Assessor's Standards:** Jessi Glancey from the Department of Revenue and MAAO Curriculum Committee met with the board to further discuss the assessor's standards and instruct a hands-on activity. Jessi presented the final version of the AMA Assessment Standards, the goal is to have all license level standards created by the end of September. The hands-on activity helped the board understand how to use the standards for approving education courses.

**County Assessors Probationary Appointment & Investigation Update:** Jon Klockziem, Property Tax Director; Josh Hooglund, Assistant Director of Assessment & Classifications; and Justin Massmann, Regional Rep Appraisal Supervisor at the Department of Revenue met with the board to discuss the new County Assessor appointment process and provide an update on investigations. Jon Klockziem explained the new Provisional County Assessor appointments process which will include a review of the assessor, county office and identify what is critical to running an assessor's office. The probationary appointment will be reviewed in the two year timeline to make sure the official appointment is valid for that person. Justin Massmann provided the board with an update on the number of complaints the Department of Revenue received in 2018 & 2019. Justin explained that in the future they would like to finalize the complaint process within 6 months of receiving the complaint. The board requested a report on the complaints that have been addressed and dismissed. Justin stated, that they would be able to provide a summary of the complaints once they become public.

### **10:00 am – Closed Meeting**

Reed Heidelberger made a motion to recess into the closed meeting. Jane Grossinger seconded the motion. The motion carried. Following the closed session, Reed Heidelberger made a motion reconvene in open session. Jane Grossinger seconded the motion. The motion carried.

Gary Amundson, vice-chair, reported in open session that the board approved a Stipulation Consent agreement related to assessor Michael Paulson and findings of a violation of the Code of Conduct and Ethics for licensed Minnesota assessors. The consent order provided that the Board of Assessors will not consider or grant any application by Michael Paulson for an assessor's license for a period of ten years. Michael Paulson agrees to pay a fine in the amount of \$750.00 to the Board of Assessors within 30 days of the date the Board of Assessors adopts this Stipulation. The Stipulation Agreement was mailed to Michael Paulson on May 23, 2019.

### **Discussion Items**

- **Board Complaint Procedures:** The board reviewed the proposed complaint procedures that were suggested by Gregg Larson. After much discussion, the board decided that these changes were acceptable.
  - Jane Grossinger made a motion that the third person on the complaint committee must be a licensed assessor. Andrea Fish seconded the motion. The motion carried.
  - Andrea Fish made a motion to approve all of the changes made to the complaint procedures. Reed Heidelberger seconded the motion. The motion carried.

Gregg Larson will update the Complaint Procedures with these changes and provide the revised document to the July meeting.

- **Trainee Real Property Appraiser:** The board decided that Trainee Real Property Appraisers license does not qualify as assessment experience.
- **Licensure vs Clerical Staff:** The consensus of the board is that there is no need for a clerical office worker to have a license to process parcel splits (provided they are not making subjective decisions on value or class). (Refer to the Assessor Licensure Requirements Clarification memo sent out on March 18, 2019 as a guideline.)
- **Review Appraisal Principles from Appraisal Institute - Benchmark Review:** Andrea Fish shared with the board her findings of the Appraisal Principles course from Appraisal Institute. Andrea explained how she used the assessor's standards to come to her conclusions. The objectives for each part were reviewed to see if they were met by the content within the workbook, and then Andrea identified the benchmark that was covered by the material and objective. The consensus of the board is that this is a good course and the board will continue to approve it. Jane Grossinger volunteered to review the Kaplan Appraisal Principles course and report back to the board with her findings.

The chairperson set the next meeting date as Tuesday, July 16, 2019 at the St. Michael City Center in St. Michael, MN at 8:30 am.

Reed Heidelbergger made a motion to pay the expenses for the meeting. Lori Schwendemann seconded the motion. The motion carried.

Andrea Fish made a motion to adjourn the meeting. Reed Heidelbergger seconded the motion. The motion carried.