

# 2019 ICAA WINTER CONFERENCE COURSE DESCRIPTIONS

## Level I/Level II:

The Level I and Level II Assessor/Appraiser courses will be taught separately (in lieu of the on-line tutorial) from Monday through Thursday (1/21 – 1/24, 2019). The courses cover real estate appraising, accounting, and property tax law. Each student needs to print and bring the 2011 Real Property Assessment Manual and Guidelines, the six POWERPOINT tutorials including the problems and answers for each module, as well as, some property record cards and the practice test. Also, bring a reliable calculator and a ruler.

The Level I and Level II exam will be administered Friday (1/25/2019) morning.

**Instructors:** Level I – Beth Singleton Level II – John Toumey (DLGF) CE Hours NA

## Workshop 151 – Uniform Standards of Professional Appraisal Practice:

This workshop covers materials from The Appraisal Foundation, *Uniform Standards of Professional Appraisal Practice* which includes: Definitions, Preamble, Ethics Rule, Record Keeping Rule, Competency Rule, Scope of Work Rule, Jurisdictional Exception Rule and Standards 1 through 3, and 6 through 10. Supplementary materials include The Appraisal Foundation *Uniform Standards of Professional Appraisal Practice (USPAP)*. This workshop includes an exam (Wednesday 1/23/2019).

**Instructor:** Lath Harris                      **15 CE Hours**

## New Assessor Training:

**\*\* This course is open to newly elected assessors and their Chief or First Deputy**

A special one and a half (1 ½) day course will be offered specifically for newly elected assessing officials and their staff members. The training sessions will be all day Wednesday (1/23/2019) and Friday (1/25/2019) morning. The tentative agenda includes:

- The Role of the Assessor and Working with Other Office Holders
- The Assessment Calendar, Deadlines, Continuing Education, and the Operations Manual
- Customer Service, Media Relations, and Dealing with Difficult People
- Appeals and the PTABOA
- The Indiana Board of Tax Review
- Sales Disclosure and Data Compliance
- Ratio Studies and the Cyclical Reassessment
- Utilities and Railcars
- Personal Property
- Mobile Homes
- Budgeting for Assessors

**Instructors:** Various **9 CE Hours**

## Personal Property/Mobile Homes:

It seems like there is always something new or different in Personal Property. Come and learn what has changed for 2019. The first half of the class will cover Personal Property, from A to Z. The second part of the class will address mobile homes. Even if you know everything there is to know about these two areas, you will probably learn something new.

**Instructor:** Steve McKinney (DLGF)                      **3 CE Hours**

## Land Commission /Cyclical Reassessment/ Land version of Market Value of Commercial:

This class will address the valuation of land, particularly commercial land, from the County Assessor's perspective, and the Department of Local Government Finance's oversight. Come learn the who, what, when, why and how of valuing land as part of the cyclical reassessment.

**Instructor:** Allen County Assessor's Office Staff/Chris Wilkening (DLGF)   **3 CE Hours**

## Exemptions/Filing 136:

This course will cover the various aspects of property tax deductions and exemptions, including a review of recent legislative changes. The course will also address government owned buildings.

**Instructors:** Emily Crisler (DLGF)                      **3 CE Hours**

## TIF/Abatements:

Tax Increment Financing (TIF) elicits many reactions. Some see TIF's as a creative way to help promote business development, while others see it as corporate welfare. Regardless of your viewpoint, this class will cover the basics of TIF's, including how TIF is used to finance projects and pay for debt, the annual process for determining TIF revenues, and the role the county assessor and county auditor have in the TIF process. This course will also cover the various aspects of the property tax abatement process, including recent legislative changes. Whether you are a novice with abatements, or a seasoned veteran, you will come away from this class with a better understanding of the abatement process, and the role of the assessing official.

**Instructors:** TBD (DLGF)                      **3 CE Hours**

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### **Workplace Safety:**

In this course you will learn and analyze the different methods and procedures to ensure safety in the workplace. You will learn what steps are taken to ensure the safety of yourself and others as well as which method and procedure is appropriate for safety. Different scenarios will be presented in which you will analyze and determine the appropriate method or procedure.

- 1.) Each method works and what the steps are to complete the discussed tasks.
- 2.) Each procedure is used to ensure safety of yourself and others in the workplace.
- 3.) To analyze these methods and procedures.
- 4.) To be able to decipher which approach is appropriate when safety is needed.

**Instructor: Steve Van Der Aa      3 CE Hours**

### **PTABOA:**

This course will first provide a deep dive into the importance of conducting discovery during proceedings pending before the Indiana Board of Tax Review. The reasons for and types of discovery, as well as pitfalls from the failure to conduct adequate discovery, will be covered in detail. Next, the course will review the statutes governing the make-up and procedures of county PTABOAs. What you must know about the PTABOA, however, goes well beyond the governing statutes - PTABOA decorum and approach to taxpayer appeals will also be reviewed.

**Instructors: Sarah Schreiber & Marilyn Meighen 3 CE Hours**

### **Data Collection A-Z:**

This class will cover a comprehensive overview of required data collection to complete a property record card. Class material will cover both residential and a wide range of topics for C & I properties. Class is suggested for those who are new to the assessing profession as well as those who just need a refresher. Helpful hints and tools will be discussed to help ensure the most accurate field work is completed.

**Instructor Ken Surface    3CE Hours**

### **Ethics:**

This session will focus on moral decision making, values-based leadership, and creation of a more robustly ethical organizational climate within the offices of County Assessors throughout Indiana. Using an interactive, discussion-based approach, we will explore scenarios and situations within an Assessor's Office that can create moral confusion, trigger conflicts of interest, and force trusted government leaders to navigate and make trade-offs between complicated duties, responsibilities, and consequences involving a variety of stakeholders and community interests. In addition to practical and applicable discussion of vignettes drawn from the experience of those with decades of Assessor's Office experience, we will also review relevant research findings from the field of behavioral science that help us understand ethical blind spots, the power of emotion and intuition, System 1 v. System 2 thinking, and the influence of implicit biases that help explain "why ethical people sometimes do unethical things." The over-arching theme and learning objective for this 3-hour session will be to heighten ethical awareness and build skills that will yield more consistent and careful analysis when values are in conflict, the public's trust is at stake, and moral courage must be exercised.

**Instructor: Joshua Perry              3 CE Hours**

### **Best Practices:**

Still a work in progress. Stay tuned for more information.

**Instructors: TBD    3 CE Hours**

### **Assertive Essentials:**

What is it that you out of your career/life? What is the best way to get what you want? A critical skill in getting the most out of your career life is learning to be assertive. Mastering assertiveness skills will help you deliver and achieve all of your objectives.

In this workshop we will cover:

The benefits of executing assertive behaviors

- Differences between behavioral styles (i.e., aggressive vs assertive)
- Identifying your strengths and applying them assertively
- Recognizing when to use assertive techniques
- Understanding and neutralizing internal obstacles
- Practicing assertive behaviors and techniques

**Instructor: Shawn Woods                      3 CE Hours**

### **Microsoft Excel Fundamentals – Level 1 - Introductory training of Microsoft Excel:**

Covers beginning-level skills ideal for the newer computer user who wants to become well versed in Excel. Topics introduced include the ribbon interface; entering and editing data; selecting cells and ranges; printing worksheets; using basic formulas and functions including Sum, Average, Max, Concatenate; formatting cell contents; inserting and deleting columns, rows, and cells; creating charts; and sorting and filtering data. Participants will learn useful tips, tricks, and keyboard shortcuts.

**Instructor: Virden Bryan    \*\*40 participants per session    3 CE Hours**

**\*\* If you attended this class during the 2018 ICAA Summer Conference you will not earn CE Hours**

### **Microsoft Excel Fundamentals – Level 2 Intermediate training of Microsoft Excel:**

Level 2 builds on the skills taught in Microsoft Excel Fundamentals – Level 1. In this class, participants learn enhanced techniques for entering and editing text and numbers, the use of templates, renaming, the most popular Auto formulas, more cell and column format features, additional workbook print and publishing features. At the completion of this course, participants will be able to add formulas to their worksheet, change its format, and specify custom areas for printing. Additional topics include using the replace text feature and spell checker, using hide/unhide columns, number and date formats, and using the range name and protect worksheet features

**\*\* If you attended this class during the 2018 ICAA Summer Conference you will not earn CE Hours**

**Instructor: Virden Bryan    .    \*\*40 participants per session                      3 CE Hours**

### **Ratio Studies: Planning, Implementing and Achieving:**

This course will be an overview of how to use the resource of time to accomplish a productive annual trending program that ends with a successful ratio study. What is needed for the various elements of a ratio study to be completed in a timely manner? How and when do the various steps need to be put into action? What do we hope to accomplish with these goals? Taking a step away from the hurried process of sales data compliance and short turnaround time for ratio study submittal, this course offers a different perspective on Equalization.

**Instructor: Lana Boswell                      3 CE Hours**