

## **2019 ICAA Summer Conference Course Descriptions**

**XSoft - Course 1** (*geared more for assessor, office manager, planning staff*)

### **Citizen engagement**

While not a new concept, the way in which citizens engage with local governmental agencies has changed over the years. A modern approach to citizen engagement suggests that some citizens appreciate the ability to interact with their local government in a digital environment, such as online access to services to; pay property taxes, research publicly available information, submit documents and forms, etc. This 90-minute session will cover the following topics:

- What is citizen engagement?
- Transparency; how much is too much?
- Overview of XSoft Engage (citizen engagement application).
- What are communities outside of Indiana doing with citizen engagement?

### **GIS / CAMA integration**

Similar to citizen engagement, integration of GIS and CAMA data is not a new concept. However, advancements in technology and data sharing standards have made the integration of GIS and CAMA data more pervasive than ever before, allowing for; improved quality control, increased productivity, and higher accuracy of both datasets. This 90-minute session will cover the following topics:

- Overview of INcama - 5 levels of GIS integration and how this works within the software.
- Allen County's GIS/CAMA integration.
- What are communities outside of Indiana doing with GIS/CAMA integration?

**Instructors:** Jesse Hawk (Allen County, Senior Data Analyst), Rual Williamson (Mind Pearl LLC), Scott Oppmann (ESRI - State and Local Government Team Lead), Scott Stephens (XSoft, VP Business Development) **3 CE Hours**

**XSoft - Course 2** (*geared more for general office staff and daily users of INcama*)

### **CAMA and Tax Integration**

This course will cover the spectrum of CAMA and Tax integration amongst all property types (real, aamh, personal property, oil & gas), including items such as adding/retiring/deleting records, splits/combinations/annexations, legal description changes, acreage changes, property class assignments, ownership changes/corrections, address changes/corrections, deduction/exemption filings, value corrections, rolling of values. Additionally, it will cover roll check and balance reports.

**Instructors:** Mike Clough and Ryan Keuneke **3 CE Hours**

### **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 (8/19 – 8/22, 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 (8/23/2019) morning.

**Instructors:** Level I – Beth Singleton; Level II – John Toumey **CE hours NA**

### **Abatements & Under \$40,000**

This course will 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. Also, the course will briefly cover the expansion of the Personal Property exemption to \$40,000.

**Instructor:** Steve McKinney **3 CE Hours**

### **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.

**Instructor:** Lath Harris **15 CE hours (first time attendees only – N/A if retaking course)**

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### **Disasters/GIS**

What to do when disaster hits? It seems like every time you turn on the news, there is another disaster (floods, tornadoes, etc.). The class will address disasters from an assessment perspective, including a review of case law, disaster petitions, and Frequently Asked Questions. Additionally, what role does GIS play, and how can the Assessor's office utilize GIS in the disaster process?

**Instructor: Barry Wood 3 CE Hours**

### **Exemptions and Deductions**

Have you ever wondered what is the difference between an exemption and deduction? What forms are filed for exemptions and what forms are filed for deductions? Where are the various forms filed, and what role does the Assessor play? Come and find out the answers to these questions and much more.

**Instructor: Barry Wood 3 CE Hours**

### **Norfolk Southern/CSX Railroad**

This class will review the assessment practices of railroads from the Railroad Company's perspective. Issues to be addressed include standard operating procedures and addresses for parcels. Also, the difference between operating and non-operating property.

**Instructors: Derek Sublette/Tax Department (Norfolk Southern), David Hall (CSX) 3 CE Hours**

### **Microsoft Teams for Ratio Studies (TEAMS)**

Microsoft Teams is a unified communications platform that combines persistent workplace chat, file storage, and application integration. Starting with the 2020 Ratio Study filing process, the DLGF will be integrating TEAMS into the review and approval process. Come and learn how TEAMS will hopefully lead to more effective and efficient communications in the Ratio Study process.

**Instructors: Vanessa Williams and Stephanie Williams (State of Indiana – Office of Technology), Deliverance Bougie (DLGF) 3 CE Hours**

### **Assessor Trivia**

Come as an individual or as a group and test your knowledge in a trivia game type atmosphere, covering a wide variety of assessing functions and topics. Not sure you will know the answers, no problem, we will cover all questions/answers in detail, providing you with a great opportunity to learn various assessing topics, while having fun at the same time.

**Instructor: Ken Surface 3 CE Hours**

### **DLGF Data Analysis 101**

This course will provide an overview of two key responsibilities of the DLGF's Data Analysis Division: Gateway Support and data compliance. During the presentation, the Data team will cover the basics of the Indiana Gateway for Government Units informational portal (i.e., "Gateway") and will discuss the history behind the portal, how to gain and delegate access to the portal as a local government official, the various applications on Gateway that local government officials report information to, and the public reporting site available on Gateway.

The second half of the presentation will provide a detailed look at the various data sets (e.g., real property assessment data, personal property assessment data, etc.) that county assessors and county auditors submit to the DLGF on a regular basis and the compliance reviews that the Data team conducts on these data sets.

**Instructors: James Johnson, Billy Ottensmeyer, Charles Gordon, Marilyn Gaas-James 3 CE Hours**

### **Emerging Appeal Issues and PTABOA topics**

This course will cover topics related to PTABOAs; their meetings, authority and powers, and their obligations and deadlines. In this class, we will also discuss different property types and valuation concepts that are being seen more frequently in appeals at the local, IBTR, and Tax Court level. Intangible value, deductions for obsolescence, hotel, nursing home, special purpose property, and more, will be addressed.

**Instructor: Brian Cusimano 3 CE Hours**

### **ICIAAO Chapter Meeting: Webinar – The Good, the Bad, and the Ugly of Assessment Policies and Practices**

In this webinar, Steve and Alan explore and present the preliminary results of the recently conducted survey of state and provincial property tax assessment policies and practices (PTAPP) in a manner that is both interesting and entertaining. It's been 10 long years since any comprehensive survey of this nature has been attempted and there have been many changes in policies and practices over that period.

**Sponsored by: Indiana Chapter of IAAO Hosted by: Andrew Smethers 3 CE Hours (open to all attendees)**

## **2019 ICAA Summer Conference Course Descriptions**

### **Customer Service, Dealing with Difficult People and Workplace Etiquette**

In today's world being successful in the workplace demands more than working hard; you must also possess great customer service skills and proper workplace etiquette. This workshop will help you build and expand on your current customer services skills. We will also help you learn how to deal with difficult people and situations.

#### **How You Will Benefit:**

- Develop the skills and practices that are essential elements of a customer service professional
- Recognize who the customers are and what they are looking for.
- Feel more confident of your business communication in every situation
- Gain that extra edge that establishes trust and credibility
- Find new and effective techniques for managing negative emotions
- Develop coping strategies for dealing with difficult people and situations

**Instructor: Shawn Woods 3 CE Hours**

### **ICIAAO Chapter Meeting: Webinar – Waterfront Properties**

Northeast Regional Manager, Melissa Baer, CAE, CCMAII, is available to present a webinar that covers some of the issues specific to waterfront properties, including FEMA, water depths and tidal changes. She'll cover valuation techniques that others can use to value a variety of types of waterfront. The goal of the Webinar is to provide participants with insight on new techniques for valuing waterfront property.

**Sponsored by: Indiana Chapter of IAAO Hosted by: Andrew Smethers 3 CE Hours (open to all attendees)**

### **ICIA AO Chapter Meeting: Webinar – Wind Farms 101**

There's more to it than a single turbine turning in the wind. A new wind farm is currently under construction in Garfield County and the presenters will describe the components and how the assessor's office can be involved way before the project starts and during the project development phase.

Many locations have wind, but it's much more involved. The presenters will examine wind energy companies' consideration of important factors such as environmental conditions, substation locations, a "grid" for purchase, transportation, and distribution besides the abundant, free, renewable natural resource, wind.

**Sponsored by: Indiana Chapter of IAAO Hosted by: Andrew Smethers 3 CE Hours (open to all attendees)**

### **Counter Terrorism / Active Shooter / FEMA COOP**

#### ***Segment 1 -Terrorism Awareness for the Public***

The presentation goes over current statistics regarding the terrorist threat across the US, some history regarding local terrorism arrests, and finishes with a request to the audience to remain vigilant and passes contact information should anyone have any suspicions about something they have seen.

**Instructor: FBI SA Jonathan Kath**

#### ***Segment 2 – Active Shooter***

Assessing officials are faced with many challenges, either in the office or in the field. The Active Shooter has unfortunately become all too common. Find out from the Indiana State Police what you can do if you encounter an Active Shooter.

**Instructor: ISP Lt Terry Treon**

#### ***Segment 3 – Continuity of Operations – The FEMA Perspective***

This presentation will focus on helping counties determine what "Essential Services" are following a disaster and how to assess what your needs would be. You will also learn how disaster response works and how local, county and state agencies working together is KEY in a successful disaster recovery.

**Instructor: Scott Huffman, CEM, MCP Division of Planning, Training, Exercise and Grants  
Indiana Department of Homeland Security 3 CE Hours (must attend all 3 segments)**

### **Legislative Updates & Best Practices Take 2**

In this course you will learn about legislative changes passed in the 2019 session and how they will impact your office. We will then switch gears and go to round table discussions with attendees being given topics in which they will discuss and then share with the group their Best Practices.

**Legislative Updates: Stacey O'Day Best Practices Moderator: Jeff Tracy Panelists: Barry Wood and Emily Crisler 3 CE Hours**