

Winter 2023 Assessor 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 tutorials) from Monday through Thursday (1/16 – 1/19/2023). The courses cover real estate appraising, accounting, and property tax law. *Each student needs to print and bring the 2021 Real Property Assessment Manual and Guidelines (including the updated 2022 Cost Tables – Appendix C & G and the Location Cost Multipliers), the six POWERPOINT tutorials (2023 Level I / II 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 (1/20/2023) morning.

Instructors: Level I – Chris Wilkening; 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.

Instructor: Jason Frost 15.0 CE Hours (**first time attendees only – N/A if retaking course)

IAAO Course #400 – Assessment Administration:

This course provides an overview of fundamental management concepts for management and supervisory personnel in an assessor's office and focuses on the need for management, and the responsibilities placed on the assessor and all supervisory personnel. The course introduces the four major management functions: planning, organizing, directing, and controlling with a separate chapter devoted to each function for more in-depth learning and discussion

Instructor: Ginny Whipple 30.0 CE Hours (**first time attendees only – N/A if retaking course)

IAAO Forum 909 – The Appraisal of Commercial Properties in a Declining Market:

Many areas are experiencing a decline in the value of their commercial and industrial properties for the first time in recent history. Explore the process for valuing properties that fall into this category. The exploration of capitalization rates, vacancy calculations, and market rents are critical to this task. The impact and adjustment, utilizing the market approach, for time will also be discussed.

Instructor: TBD 7.50 CE Hours

IAAO Forum 917- How to Critique an Appraisal:

Discover a methodical approach to the review and critique of appraisals submitted in support of assessment reduction. You will distinguish if an appraiser acts as an advocate for the client, or truly approaches the assignment as a disinterested unbiased third party. All aspects of an appraisal will be inspected to ascertain the credibility and reliability of the work submitted.

Instructor: Andrew Smethers & Lana Boswell 7.50 CE Hours

PPOP-IN:

The Department of Local Government Finance (DLGF) launched PPOP-IN, a self-service Personal Property online portal, in January 2021. Two (2) years later, come and learn what has been changed and updated for 2023. ***This is an interactive class; hence, please bring a laptop.*** The class will include a demonstration of what a filing looks like from an agent's perspective, a taxpayer's perspective, and the assessor's perspective.

Instructors: Lesley Middleton and XSoft Representative 3.0 CE Hours

Personal Property:

It seems like there is always something new or different in Personal Property. Come and learn what has changed for 2023. This class will cover basic definitions, address Real Property versus Personal Property, the exemption filing changes, reasons and authority for conducting an audit, as well as best practices of personal property.

Instructor: Kevin Chestnut 3.0 CE Hours

Abatements; Economic Development:

An expansion of our previous half-day classes, this full-day course will cover the various aspects of the property tax abatement process in greater detail. Representatives from the DLGF and Baker Tilley will review the abatement process from an assessment and a fiscal analyst perspective

Instructor: Steve McKinney and Matt Eckerle 3.0 CE Hours

State Distributable/Renewable Energy:

The DLGF is responsible for assessing the value of public utilities and railroads in Indiana. This class will review the various statutory and administrative code provisions for the assessment of utilities and railroads, as well as the many changes that have occurred over the past few years. Additionally, this class will review the assessment of “Renewable Energy” properties (e.g., Solar, Geothermal, and Wind Towers).

Instructors: Julie Waddell & Marlo Hayden 3.0 CE Hours

Deduction and Exemption Update:

This class will provide a detailed update and discussion about deductions and exemptions, particularly those found in Indiana Code 6-1.1-10-16. Recent Court decisions will be covered. PTABOA responsibilities and procedures will also be discussed.

Instructors: Sarah Schreiber and Jennifer Thuma 3.0 CE Hours

Sales Disclosures and Data Compliance:

Part One: What are some “best practices” to consider as you complete the review of your county’s sales data in preparation for submission via Gateway SDF? How do I upload our sales data via Gateway SDF? What sort of items or checks does the DLGF currently look at as part of its compliance review process of the sales data? What are some of the major changes with the Sales Disclosure Form and Frequently Asked Questions?

Part Two: The second part will be interactive, comparing the sales disclosure form process of smaller counties with larger counties. We will provide examples of real scenarios that are likely to come up when approving and validating sales disclosure forms. We will have a group discussion on issues we come across and efficient ways to handle them. Going over the steps required to have the sales prepared for the ratio study to go as smoothly as possible. We hope you can leave with enough information to ease the sales process throughout the year.

Instructors: DLGF Representatives, Natasha Zizelman, Jill Weikart 3.0 CE Hours

Best Practices:

Whether if you are a seasoned veteran or a novice, come and learn (and share) best practices in various assessment areas. Be ready to discuss and share your thoughts on a variety of topics. Also, bring your questions and concerns.

Moderator: Jeff Tracy / Panelist: DLGF Representatives 3.0 CE Hours

New Assessor Training:

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

A special two (2) day course will be offered specifically for newly elected assessing officials and their staff members. The training sessions will be all day Monday (1/16/2023) and Tuesday (1/17/2023). The tentative agenda includes:

- The Role of the Assessor
- The Assessment Calendar, Continuing Education, and the Operations Manual
- Forms and Memos
- Personal Property
- Mobile Homes
- Appeals and the PTABOA
- State Distributable and Railroads/Railcars
- Budget Overview
- Data Compliance
- The Indiana Board of Tax Review
- Ratio Studies
- Deductions and Exemptions

Instructors: Various Instructors 12.0 CE Hours

Appeals/Informal Hearings/PTABOA:

This course will cover the various aspects of not only the process of handling Appeals, Informal Hearings and PTABOA but the various viewpoints from a small, medium and large county. There will also be round table discussion after each portion is covered to enable an exchange of ideas and procedures.

Instructors: Katie Potter, Ann Thurston, Chris Gilbert & DLGF Representative 3.0 CE Hours

Land Valuation and Land Orders:

This class will be centered around helpful information regarding the various aspects of assessing land, with a specific emphasis on the Land Order. Come learn the who, what, when, why and how of valuing land, land orders and best practices.

Instructors: Latonya Harris-Spearman, Kevin Poore, DLGF Representative – TBD 3 CE Hours

Retirement, It's NEVER too Early to Start Planning:

Understanding Your Plan: Not ready to retire but still want to know about your benefits plan? Please attend this session to learn:

- What plan am I in
- How does the plan work
- Explanation of retirement benefits
- Information about working after retirement
- Answers to your benefit plan questions.

INPRS presents: InFRE's Managing Retirement Your Retirement Income

During this InFre licensed session we will address four important retirement planning questions:

- What's different about retirement?
- How much will I need in retirement?
- How can I eliminate retirement income gaps
- How can I convert retirement assets into income?

Instructor: Lisa Anderson 3 CE Hours