



CITY COUNCIL WORK SESSION AGENDA

JANUARY 10, 2023 – 6:00 pm

1. CALL TO ORDER
2. 6:00 – ASSESSOR CONTRACT DISCUSSION
3. 6:30 – DOCK POLICY PROPOSED AMENDMENTS
4. 6:40 – DOG LICENSING DISCUSSION
5. 6:45 – ORGANICS RECYCLING DISCUSSION
6. 6:50 – MISCELLANEOUS
7. 6:55 – ADJOURNMENT

Note: Agenda times are approximate

HENNEPIN COUNTY
MINNESOTA

Professional Assessing Services

2023

*Proposal from the Hennepin County Assessor's Office to be the City of Tonka
Bay assessor*

Joshua R. Hoogland
300 S. 6th Street – MC213
Minneapolis, MN 55487
612-348-8853
joshua.hoogland@hennepin.us

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Letter of Transmittal

January 4, 2022

Dan Tolsma, City Administrator
4901 Manitou Road
Tonka Bay, MN 55331

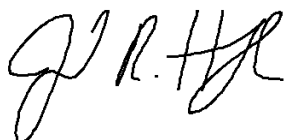
Re: City of Tonka Bay Assessment Services

Mr. Tolsma:

Attached are documents to support the qualifications and capacity of the Hennepin County Assessor's Office to perform the assessing functions uniformly and accurately for the City of Tonka Bay property assessments.

Hennepin County and the County Assessor Department are committed to providing excellent customer service to taxpayers, city administration and officials through responsiveness, transparency and competency. We are also committed to meeting and exceeding the assessment requirements outlined in the laws of the State of Minnesota, guidance provided by the Minnesota Department of Revenue and expectations of the Hennepin County Assessor.

The Hennepin County Assessor's Office has an excellent track record in producing accurate and statistically equitable assessments in the cities we serve, and we appreciate your considerations of the attached materials.



Joshua R. Hoogland, SAMA, MPA
Hennepin County Assessor
January 4, 2023

Executive Summary

The Hennepin County Assessor's Office contracts with 34 cities to perform assessing functions throughout Hennepin County. Of these contracts, 31 are to perform full assessing services and three are to perform commercial, industrial and apartment assessing only.

The first-year cost to perform assessing functions for the City of Tonka Bay will be \$44,000. The contract terms are outlined as requested, including a four (4) year term with the option for a four (4) year extension. This covers the 2024, 2025, 2026 and 2027 assessments for the City of Tonka Bay.

The Hennepin County Assessor's Office has a budgeted staff of 66 dedicated full-time employees including 13 commercial, industrial and apartment appraisers and 22 residential and agricultural appraisers. Our appraisal staff is experienced and educated to handle all appraisal problems throughout the county including several appraisers with expertise in appraising Lake Minnetonka communities and properties. Our staff has tremendous experience in serving similar jurisdictions as the City of Tonka Bay and can use that expertise to provide excellent service to the City of Tonka Bay and its residents. Each member of our appraisal teams is licensed to assess property in compliance with the Minnesota State Board of Assessing Officers and the State of Minnesota.

Michael Smerdon, State Board of Assessors license number 3150, is a leading expert in appraising Lake Minnetonka communities and analyzing assessment trends. Michael will be the principal appraiser leading the team responsible for the City of Tonka Bay residential assessment. Melody Devine, State Board of Assessors license number 4250, is the lead appraiser assigned to the Lake Minnetonka region for assessing commercial and industrial properties. The Hennepin County Assessor's teams and training provide excellent resource management to ensure all communities and taxpayers receive responsive service and accurate explanations regarding assessment processes and trends.

Overall, the Hennepin County Assessor's Office staff appraisers are experienced in all facets of the assessment process including local and county board appeal processes,

Minnesota Tax Court litigation, annual quintile and new construction data collection, diligent sales verification processing and fair and equitable assessment creation.

In addition to appraisal staff, the department's support teams ensure accurate data and analysis, compliance with assessment laws and standards and support of the assessment processes and office functions.

Assessing Services Description

Contract No. A23XXXX

CITY OF TONKA BAY

During the contract term, the County shall:

1. Physically inspect and revalue 20% of the real property, as required by law.
2. Physically inspect and value all new construction, additions and renovation.
3. Adjust estimated market values on those properties not physically inspected as deemed necessary per sales ratio analysis.
4. Prepare the initial assessment roll.
5. Print and mail valuation notices.
6. Respond to taxpayers regarding assessment or appraisal problems or inquiries.
7. Conduct valuation reviews prior to Board of Review or Open Book Meetings, as determined by the City – approximate dates: March through May 15.
8. Attend Board of Review or conduct Open Book Meeting. Prepare all necessary review appraisals. Approximate dates: April 1 – May 31.
9. Maintain an updated property file – current values, classification data and characteristic data.
10. Prepare divisions and combinations as required.
10. Administer the abatement process pursuant to Minn. Stat. §375.192.
11. Prepare appraisals; defend and/or negotiate all Tax Court cases.
12. Provide all computer hardware and software applications necessary to complete contracted services.

Qualifications

The Hennepin County Assessor's Office is contracted to serve as the city assessor in 34 cities. In addition, we are responsible for the annual assessments for the Minneapolis/St. Paul Airport and Fort Snelling.

The City of Tonka Bay will have a contact in Michael Smerdon, SAMA, Assessor License #3150. Michael is one of four Principal Residential Appraisers in our department. Michael oversees the work of staff and contracted appraisers in the Lake Minnetonka region of Hennepin County and is also the lead appraiser in other Lake Minnetonka jurisdictions.

In support of Michael, the remaining staff of our 66 full time employees in the Hennepin County Assessor's office will be committed to ensuring timely and accurate results of the City of Tonka Bay's assessments. All appraisers employed by the Hennepin County Assessor's department are adequately licensed through the Minnesota State Board of Assessors to perform assessing services.

Hennepin County Assessor staff are forbidden from performing outside work involving assessing, appraisal, real estate sales or brokerage, property management or any other fields that may present a conflict of interest in performing their appraisal and assessment duties within the cities we have contracted with.

I am including as an attachment to this proposal a list of the Hennepin County Assessing Contract Contact List. This lists all jurisdictions that currently contract with Hennepin County, the primary contact at each city, their contact information and when the contract began with the county to perform assessing services. I am including this list to assist with transparency and to provide the City of Tonka Bay with an opportunity to review references of our work and outcomes. Each of these contracts are full assessing services for either the entire city assessing functions or just the commercial, industrial and apartment assessing services as indicated in the document.

Our draft contract, "DRAFT Tonka Bay AY 2023 Assessment Services Agreement" is our standard base contract. Section 12A and 12B on page 6 describes our fee and what may increase or decrease the fee in future years. In summary, contract costs are increased based on additional parcels, new construction adds [e.g., new homes] and increases to our costs [COLA, health insurance, mileage, etc.] Hennepin County only

charges adequate fees to cover the work associated with the contracts and the specific City's assessment needs. Our proposal is for a four (4) year agreement with a four (4) year extension. This would cover assessment years 2024, 2025, 2026 and 2027.

The county is self-insured and does not carry any errors and omissions coverage.

Any member of our staff or myself are prepared to answer any questions the Mayor, Council Members, or City Administration may have on our assessing services. In addition, all staff of the County Assessor's Office are available at any time to work with the Mayor, Council, City Administration, City Staff, and property owners and taxpayers of the City of Tonka Bay. The office is staffed primarily during the hours of 7:30 AM to 5:00 PM during normal business days and can be available during public meetings as requested by the City of Tonka Bay to ensure officials and staff are informed of assessment trends and results. We are available via phone call, text or email to respond to any and all inquiries.

Attachments

Included with this proposal are additional documents to support the decision of the City of Tonka Bay on assessing services.

1. City of Tonka Bay Assessing Services Proposal
2. Why Hennepin
3. DRAFT Tonka Bay AY 2023 Assessment Services Agreement
4. Hennepin County Contract Contact List
5. Assessor Expectations 2023 Assessment

Contact information

Joshua R. Hoogland
Hennepin County Assessor
State Board of Assessors License #3165
300 S. 6th St. – MC213
Minneapolis, MN 55487
612-348-8853
joshua.hoogland@hennepin.us

Ashley Gunderson
Assistant Hennepin County Assessor – Commercial
State Board of Assessors License #3650
300 S. 6th St. – MC213
Minneapolis, MN 55487
612-596-7447
ashley.gunderson@hennepin.us

Michael Smerdon
Principal Residential Appraiser – Lakeshore Region
State Board of Assessors License #3150
300 S. 6th St. – MC213
Minneapolis, MN 55487
612-267-4480
michael.smerdon@hennepin.us





At a Glance

Learn why the Hennepin County Assessor's Office should be your choice for your assessing needs.

Our mission is to value and classify property, uniformly and accurately.

Why Hennepin County?

- Customer Service
- Uniformity & Accuracy
- Trust & Transparency
- Resources & Tools
- Experience & Expertise
- Professional Staff

Customer Service

Customer service is an important core value of Hennepin County and is an integral part of the Hennepin County Assessor's practical vision and office values.

- We are committed to having professional employees that are equipped with the training and skills needed to effectively educate and serve our stakeholders.
- We strive for open communication with stakeholders for an effective partnership.
- We engage and respond to customers with care in all situations.
- We achieve excellence in valuation and classification at a reasonable cost.

Assessment Uniformity and Accuracy

Our informed staff are knowledgeable of regional and local markets, rather than just one city.

Trust and Transparency

We are committed to establishing a culture of trust and transparency by enforcing:

- Clear expectations for measurable success
- High level of assessment standards and professional conduct
- Required IT security training
- A commitment by staff to the function of valuing and classifying property for Hennepin County

Resources and Tools

- Our staff has access to tools such as aerial and streetview imagery, Marshall & Swift, RecordEase, GIS and licensed valuation publications.
- We use Open Book resources and options including a 'regional' Open Book with multiple locations and times.
- Our data is digitized and secure.
- We have direct access to legal counsel.



HENNEPIN COUNTY

ASSESSOR'S OFFICE

Experience & Expertise

Our team consists of 66 full time staff that collectively has hundreds of years of service and experience in the assessing profession. This does not include additional years of fee appraisal, construction, property management and other real estate experience. In addition, all of our staff receive professional education and continuing assessment training. We have 34 team members with assessment designations through the Minnesota State Board of Assessors, 27 of which are Accredited or Senior Accredited Minnesota Assessors, the highest level of accreditation given by the State Board of Assessors.

Our staff:

- Includes experts specializing in homesteads, exemptions, Veteran's Exclusions, Open Space, Green Acres, Local Board of Appeal and Equalization, Open Book Meetings, and tax court appeals
- Is qualified to appraise all property in Hennepin County
- Is specialized in dealing with executive homes, lakeshore and agricultural properties
- Has valuation modeling & statistical analysis experts
- Has direct access to IT/technical experts, legal experts, real estate tax experts, project managers, trainers and business analysts

Professional Staff

Our team consists of well-networked, well educated staff who have connections and resources with colleagues not only in the profession of assessing, but also with other county resources such as IT, project management, training and education. In addition:

- Many of our staff members are active in professional organizations, giving them better access to education and training resources, networking and a larger influence in guiding related state wide policies.
- You can have confidence and trust in staff that undergo background checks, driver's license validations and data security training.
- We engage our staff by offering fair compensation, good benefits, opportunities for growth and an inviting culture.
- We ensure stability and continuity of staff through mentoring and knowledge transfer.
- We do not use sub-contractors for appraisal staff.

AGREEMENT

THIS AGREEMENT, Made and entered into by and between the COUNTY OF HENNEPIN, a political subdivision of the State of Minnesota, hereinafter referred to as the "COUNTY", and the CITY OF TONKA BAY, a political subdivision of the State of Minnesota, hereinafter referred to as "CITY";

WHEREAS, said CITY lies wholly within the COUNTY OF HENNEPIN and constitutes a separate assessment district; and

WHEREAS, under such circumstances, the provisions of Minnesota Statutes, Section 273.072 and Minnesota Statutes, Section 471.59 permit the County Assessor to provide for the assessment of property; and

WHEREAS, said CITY desires the COUNTY to perform certain assessments on behalf of said CITY; and

WHEREAS, the COUNTY is willing to cooperate with said CITY by completing the assessment in a proper manner;

NOW, THEREFORE, in consideration of the mutual covenants contained herein, it is agreed as follows:

1. The COUNTY shall perform the 2024 property assessment for the CITY OF TONKA BAY in accordance with property assessment procedures and practices established and observed by the COUNTY, the validity and reasonableness of which are hereby acknowledged and approved by the CITY. Any such practices and procedures may be changed from time to time, by the COUNTY in its sole judgment, when good and efficient assessment procedures so require. The property assessment by the COUNTY shall be composed of those assessment services which are set forth in

Exhibit A, attached hereto and made a part hereof by this reference, provided that the time frames set forth therein shall be considered to be approximate only.

2. All information, records, data, reports, etc. necessary to allow the COUNTY to carry out its herein responsibilities shall be furnished to the COUNTY without charge by the CITY, and the CITY agrees to cooperate in good faith with the COUNTY in carrying out the work under this Agreement.

3. The CITY agrees to furnish, without charge, office space needed by the COUNTY at appropriate places in the CITY's offices. Such office space shall be sufficient in size to accommodate reasonably one (1) appraiser and any furniture placed therein. The office space shall be available for the COUNTY's use at any and all times during typical business hours, and during all such hours the COUNTY shall be provided with levels of heat, air conditioning and ventilation as are appropriate for the seasons.

4. The CITY also agrees to provide appropriate desk and office furniture as necessary, clerical and secretarial support necessary and reasonable for the carrying out of the work herein, necessary office supplies and equipment, copying machines and fax machines and their respective supplies, and telephone and internet service to the COUNTY, all without charge to the COUNTY.

5. In accordance with Hennepin County Affirmative Action Policy and the County Commissioners' policies against discrimination, no person shall be excluded from full employment rights or participation in or the benefits of any program, service or activity on the grounds of race, color, creed, religion, age, sex, disability, marital status, sexual orientation, public assistance status, ex-offender status or national origin; and no person who is protected by applicable Federal or State laws, rules and regulations against discrimination shall be otherwise subjected to discrimination.

6. It is agreed that nothing herein contained is intended or should be construed in any manner as creating or establishing the relationship of joint venturers or co-partners between the parties hereto or as constituting the CITY as the agent, representative or employee of the COUNTY for any purpose or in any manner whatsoever. Any and all personnel of CITY or other persons, while engaged in the performance of any activity under this Agreement, shall have no contractual relationship with the COUNTY and shall not be considered employees of the COUNTY and any and all claims that may or might arise under the Workers' Compensation Act of the State of Minnesota on behalf of said personnel or other persons while so engaged, and any and all claims whatsoever on behalf of any such person or personnel arising out of employment or alleged employment including, without limitation, claims of discrimination against the CITY, its officers, agents, CITY or employees shall in no way be the responsibility of the COUNTY, and CITY shall defend, indemnify and hold the COUNTY, its officials, officers, agents, employees and duly authorized volunteers harmless from any and all such claims regardless of any determination of any pertinent tribunal, agency, board, commission or court. Such personnel or other persons shall not require nor be entitled to any compensation, rights or benefits of any kind whatsoever from the COUNTY, including, without limitation, tenure rights, medical and hospital care, sick and vacation leave, Workers' Compensation, Re-employment Compensation, disability, severance pay and retirement benefits.

7. CITY agrees that it will defend, indemnify and hold the COUNTY, its elected officials, officers, agents, employees and duly authorized volunteers harmless from any and all liability (statutory or otherwise) claims, suits, damages, judgments, interest, costs or expenses (including reasonable attorney's fees, witness fees and

disbursements incurred in the defense thereof) resulting from or caused by the negligent or intentional acts or omissions of the CITY, its officers, agents, contractors, employees or duly authorized volunteers in the performance of the responsibilities provided by this Agreement. The CITY's liability shall be governed by Minn. Stat. Chapter 466 and other applicable law, rule and regulation, including common law.

8. COUNTY agrees that it will defend, indemnify and hold the CITY, its elected officials, officers, agents, employees and duly authorized volunteers harmless from any and all liability (statutory or otherwise) claims, suits, damages, judgments, interest, costs or expenses (including reasonable attorney's fees, witness fees and disbursements incurred in the defense thereof) resulting from or caused by the negligent or intentional acts or omissions of the COUNTY, its officers, agents, contractors, employees or duly authorized volunteers in the performance of the responsibilities provided by this Agreement. The COUNTY's liability shall be governed by Minn. Stat. Chapter 466 and other applicable law, rule and regulation, including common law.

9. The COUNTY shall endeavor to perform all services called for herein in an efficient manner. The sole and exclusive remedy for any breach of this Agreement by the COUNTY and for COUNTY's liability of any kind whatsoever, including but not limited to liability arising out of, resulting from or in any manner related to contract, tort, warranty, statute or otherwise, shall be limited to correcting diligently any deficiency in said services as is reasonably possible under the pertinent circumstances.

10. Neither party hereto shall be deemed to be in default of any provision of this Agreement, or for delay or failure in performance, resulting from causes beyond the reasonable control of such party, which causes shall include, but are not limited to, acts

of God, labor disputes, acts of civil or military authority, fire, civil disturbance, changes in laws, ordinances or regulations which materially affect the provisions hereof, or any other causes beyond the parties' reasonable control.

11. This Agreement shall commence on August 1, 2023 and shall terminate on July 31, 2027. Either party may initiate an extension of this Agreement for a term of four (4) years by giving the other written notice of its intent to so extend prior to March 1, 2027. If the party who receives said notice of intent to extend gives written notice to the other party of its desire not to extend prior to, April 15, 2027 this Agreement shall terminate on July 31, 2027.

Nothing herein shall preclude the parties, prior to the end of this Agreement, from agreeing to extend this contract for a term of four (4) years. Any extended term hereof shall be on the same terms and conditions set forth herein and shall commence on August 1, 2023. Either party may terminate this Agreement for "just cause" as determined by the Commissioner of Revenue after hearing for such a determination is held by the Commissioner of Revenue and which has been attended by representatives of COUNTY and CITY or which said representatives had a reasonable opportunity to attend, provided that after such determination, any party desiring to cancel this Agreement may do so by giving the other party no less than 120 days' written notice. If the CITY should cancel this Agreement, as above provided, before the completion of the then current property assessment by the COUNTY, the CITY agrees to defend and hold the COUNTY, its officials, officers, agents, employees and duly authorized volunteers harmless from any liability that might ensue as a result of the non-completion of a property tax assessment.

For the purpose of this Agreement, the term "just cause" shall mean the failure of any party hereto reasonably to perform a material responsibility arising hereunder.

12.A. In consideration of said assessment services, the CITY agrees to pay the COUNTY the sum of Forty-Four Thousand Dollars (\$44,000) for each assessment, provided that any payment for the current year's assessment may be increased or decreased by that amount which exceeds or is less than the COUNTY's estimated cost of appraising new construction and new parcels for the current year's assessment. The amount of any increase or decrease shall be specified in the billing for the current year's assessment.

12.B. Regarding each assessment, in addition to being subject to adjustment in the above manner, said assessment cost of \$44,000 may also be increased by the COUNTY if:

- (1) The COUNTY determines that any cost to the COUNTY in carrying out any aspect of this Agreement has increased, including but not limited to the following types of costs: **new construction and new parcel appraisals, mileage, postage, supplies, labor (including fringe benefits) and other types of costs, whether similar or dissimilar; and/or**
- 2) The COUNTY reasonably determines that other costs should be included in the costs of assessment work.

If the COUNTY desires to increase the assessment cost pursuant to this paragraph 12.B, it shall give written notice thereof by June 15 of any year and such increase shall apply to the assessment for the calendar year next following the current calendar year. Any such notification shall specifically set forth the amount of any new construction and new parcel appraisal charges. Notwithstanding any provisions herein to the contrary, if any such increase, exclusive of any charge for the estimated costs of new construction and new parcel appraisals, exceeds seven and one half percent (7.5%) of the amount charged for the assessment for the then current calendar year, exclusive of any charge for the estimated costs of new construction and new parcel appraisals, the CITY may cancel this Agreement

by giving to the COUNTY written notice thereof, provided that said cancellation notice must be received by the COUNTY not later than July 24 of the then current calendar year and said cancellation shall be effective no earlier than five (5) days after the receipt of said notice by the COUNTY and not later than July 31 of said next calendar year. Supportive records of the cost increase will be open to inspection by the CITY at such times as are mutually agreed upon by the COUNTY and CITY.

Failure of the COUNTY to give the CITY a price-change notice by June 15 shall not preclude the COUNTY from giving CITY such notice after said date but prior to September 1 of any year, provided that if such price increase exceeds said seven and one half percent (7.5%) - all as above set forth - the CITY may cancel this Agreement if the COUNTY receives notice thereof not later than thirty-nine (39) days from the date of receipt by the CITY of any said late price-change notice, provided further that any such cancellation shall be effective not earlier than five (5) days after COUNTY's receipt of said cancellation notice and not later than forty-six (46) days after the CITY's receipt of any said price-increase notice.

Payment for each assessment shall be made in the following manner:
Approximately one-half (1/2) of the cost of an assessment (the amount payable being set forth in a bill sent by the COUNTY to the CITY) shall be paid by the CITY no later than the fifteenth (15th) day of the December which precedes the pertinent assessment year; and the remaining portion of said cost (the amount payable being set forth in a bill sent by the COUNTY to the CITY) shall be paid by the CITY no later than July 15 of the pertinent year.

The COUNTY may bill the CITY after the aforesaid dates and in each such case, the CITY shall pay such bill within thirty (30) days after receipt thereof.

13. Any notice or demand, which may or must be given or made by a party hereto, under the terms of this Agreement or any statute or ordinance, shall be in writing and shall be sent registered or certified mail to the other party addressed as follows:

TO CITY: City Administrator
 City of Tonka Bay
 4901 Manitou Road
 Tonka Bay, MN 55331

TO COUNTY: Hennepin County Administrator
 2300A Government Center
 Minneapolis, MN 55487

copies to: County Assessor
 Hennepin County
 2103A Government Center
 Minneapolis, MN 55487

copies to: Assistant County Assessor
 Hennepin County
 2103A Government Center
 Minneapolis, MN 55487

Any party may designate a different addressee or address at any time by giving written notice thereof as above provided. Any notice, if mailed, properly addressed, postage prepaid, registered or certified mail, shall be deemed dispatched on the registered date or that stamped on the certified mail receipt and shall be deemed received within the second business day thereafter or when it is actually received, whichever is sooner. Any notice delivered by hand shall be deemed received upon actual delivery.

14. It is expressly understood that the obligations of the CITY under

Paragraphs 7, 8, 12, and 13 hereof and the obligations of the CITY which, by their sense and context, are intended to survive the performance thereof by the CITY, shall so survive the completion of performance, termination or cancellation of this Agreement.

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IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by its duly authorized officers and delivered on its behalf, this _____ day of _____, 2023.

COUNTY OF HENNEPIN
STATE OF MINNESOTA

Reviewed by County
Attorney's Office:

By: _____
Chair of the County Board

Date: _____

And: _____
Assistant/Deputy/County Administrator

ATTEST: _____
Deputy/Clerk of the County Board

CITY OF TONKA BAY

By: _____

Its _____

And: _____

Its _____

City organized under:

_____ Statutory _____ Option A _____ Option B _____ Charter

EXHIBIT A
CITY OF TONKA BAY

During the contract term, the County shall:

1. Physically inspect and revalue 20% of the real property, as required by law.
2. Physically inspect and value all new construction, additions and renovation.
3. Adjust estimated market values on those properties not physically inspected as deemed necessary per sales ratio analysis.
4. Prepare the initial assessment roll.
5. Print and mail valuation notices.
6. Respond to taxpayers regarding assessment or appraisal problems or inquiries.
7. Conduct valuation reviews prior to Board of Review or Open Book Meetings, as determined by the City – approximate dates: March through May 15.
8. Attend Board of Review or conduct Open Book Meeting. Prepare all necessary review appraisals. Approximate dates: April 1 – May 31.
9. Maintain an updated property file – current values, classification data and characteristic data.
10. Prepare divisions and combinations as required.
11. Administer the abatement process pursuant to Minn. Stat. §375.192.
12. Prepare appraisals; defend and/or negotiate all Tax Court cases.
13. Provide all computer hardware and software applications necessary to complete contracted services.

City	First Name	Last Name	Position	Phone	Client since	Contract Type
Brooklyn Center	Jesse	Anderson	Deputy Director Community Developme	763-569-3420	5/1/2014	FULL
Champlin	Shelly	Peterson	Finance Director	763-923-7107	8/1/2007	FULL
Chanhassen	Laurie	Hokkanen	City Manager	952-227-1118	Very long time	FULL
Corcoran	Jessica	Beise	City Administrator	763-400-7029	9/1/2020	FULL
Crystal	Adam	Bell (Start date 1/17/23)	City Manager	763-531-1140	6/1/1993	FULL
Excelsior	Kristi	Luger	City Manager	952-653-3672	8/1/2021	C/I/A Only
Dayton	Zach	Doud	City Administrator	763-323-4010 - 122	8/1/2007	FULL
Deephaven	Dana	Young	Administrator	952-358-9939	8/1/2013	C/I/A Only
Golden Valley	Susan	Virnig	Finance Director	763-593-8000	5/1/1978	FULL
Greenfield	Margaret	Webb	City Administration - Clerk	763-477-6464	8/1/2003	FULL
Greenwood	Shanda	Wilhelmy	Administrator	952-474-6633	5/1/2017	FULL
Hanover	Brian	Hagen	City Administrator / Treasurer	763-497-3777	11/1/2000	FULL
Hopkins	Nick	Bishop	Finance Director	952-548-6330	8/1/2003	FULL
Independence	Mark	Kaltsas	Administrator	763-479-0513	7/1/1972	FULL
Loretto	Mary	Schneider	City Clerk / Treasurer	763-479-4305	3/14/1972	FULL
Maple Plain	Clarissa	Hadler	City Administrator	763-479-0516	9/1/2015	FULL
Medicine Lake	Nancy	Pauly	City Clerk	763-542-9701	Very long time	FULL
Medina	Scott	Johnson	City Administrator	763-473-8840	8/1/2021	C/I/A Only
Minnetonka Beach	Heidi	Honey	City Administrator	952-471-8878	9/1/2018	FULL
Minnetrista	Brian	Grimm	Finance Director	952-241-2516	11/10/1980	FULL
Mound	Catherine	Pausche	Administrative Services Director	952-472-0633	9/12/1972	FULL
New Hope	Tim	Hoyt	City Manager	763-398-1203	10/15/1974	FULL
Orono	Ron	Olson	Finance Director	952-249-4611	9/1/1998	FULL
Osseo	Riley	Grams	Administrator	763-425-3861	10/15/1992	FULL
Plymouth	Dave	Callister	City Manager	763-509-5051	7/1/2014	FULL
Richfield	Kumud	Verma	Finance Manager	612-861-9723	7/1/1981	FULL
Robbinsdale	Tim	Sandvik	City Manager	763-531-1258	8/1/2012	FULL
Rockford	Audra	Etzel	City Clerk	763-477-6565	11/1/2001	FULL
Rogers	Steve	Stahmer	Administrator	763-428-2253	8/1/2003	FULL
Shorewood	Ed	Shukle	City Administrator	952-960-7905	9/1/1998	FULL
Spring Park	Mike	Anderson	City Administrator	952-999-7493	8/15/1980	FULL
St. Anthony	Shelly	Rueckert	Finance Director	612-782-3316	9/20/1978	FULL
St. Bonifacius	Brenda	Fisk	Administrator/Clerk/Treasurer	952-446-1061	7/1/2017	FULL
Wayzata	Jeffrey	Dahl	City Manager	952-404-5309	8/1/2013	FULL

HENNEPIN COUNTY
MINNESOTA

Assessor Information & Expectations

2023 Assessment

Final Version 2.0

James R. Atchison, SAMA
County Assessor
300 South 6th Street
Minneapolis, MN 55487
(612) 348-3046
James.atchison@hennepin.us

June 2, 2022

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Timeline

Timeline is preliminary and subject to change.

July	13	HAM Meeting (<i>Date TBD</i>) Ratio Reports: Sales Source eCRV
August	10	HAM Meeting Ratio Reports: Sales Source eCRV
September	7	HAM Meeting Ratio Reports: Sales Source eCRV
	30	State Sales Study Period Ends
October	12	HAM Meeting First trend report from state Direct and MCAP HAMM reports run off state sales list State trends applied to MCAP reports Internal trend report calculated off state sales list Final 2022 Assessment Timeline Released
November	4	All Sales Code Changes from Appraisers Due
	9	Hennepin Submits Final Sale Code Changes to State – <i>Date Estimated</i>
	9	HAM Direct and MCAP HAMM reports run off state sales list State trends applied to MCAP reports
	14	CIA Countywide Analysis Report
	21	Sale Code Changes for significant New Construction Due – <i>Date Estimated</i>
	23	Appraisers should submit 2021 Assessment Changes – <i>Date Estimated</i>
	30	Final 2021 Tolerances, Targets and Watches Released
	30	Last day to submit 2020 Assessment 250 change orders - <i>Date estimated</i>
December	1	County Assessor to Review Local Assessor Assessment Data
	2	Direct and MCAP HAMM reports run off state sales list State trends applied to MCAP reports Internal trend report calculated off state sales list
	5	Pre-Submission Meetings Big 7 & Local Assessors (Estimate 12/5 – 12/9)
	10	Final Time Adjustments Published – <i>Date estimated</i>
	12	HC Contract Cities Assessments Begin Assessment Submissions - <i>Date estimated</i>
	12	DOR Green Acre and Rural Preserve Values Published - <i>Date estimated</i>
	12	MCAP Trend appeals due to State DOR - <i>Date estimated</i>
	14	No HAM Meeting (<i>Replaced with Pre-Submission Meetings</i>)
	15	Distributing Local Assessors Posting Files (12/15 – 12/30)
	15	Distribute Golf Course Values

January	30	Manufactured Home Assessment Due (2022 values minimum requirement)
	2	Assessment Day
	3	CIA Preliminary Assessments for all jurisdictions in Hennepin County
	11	HAMM
		Direct and MCAP HAMM reports run off state sales list
		State trends applied to MCAP reports
	9	Local Assessors Assessments Due (1/9 – 1/13) - <i>Dates Estimated</i>
	11	All MCAP Trend Appeal Results Released by DOR - <i>Date Estimated</i>
20	All Assessment Submissions Due – Jan 23 upon request	
February	1	Personal Property Assessments Due
	1	Exempt Values Due
	6	Ag Data File provided by county
	9	Ag Data File Updates Due
	15	Final Assessment Approvals – <i>Date estimated</i>
	15	All changes to PINS to be reflected in PRISM and Annual Report– <i>Date Estimated</i>
	18	Preferred Commercial Chaining Reflecting Ownership Changes – <i>Date Estimated</i>
17	Data Cut for PRISM and Annual Report – <i>Date Estimated</i>	
March	20	Annual Assessment Report Published (<i>Date to coincide with League of Cities Mtg</i>)
April	1	PRISM Submission Due to DOR
May	28	Assessor Disclosure forms, Quintile and Staffing Updates Due

Assessor Expectation Change History

2022 Version 1.0

Updates for the 2022 Assessment are underlined throughout the document.

Computer Systems & Devices

Background required for access to social security numbers in PINS and OneHomestead effective August 1, 2021

Exempt

Cities should be preparing for the 2022 Exempt assessment. Expectations for the exempt assessment include having full property record details for all exempt parcels including:

- Land and neighborhood data
- Building characteristic data
- Digital sketch and photograph
- 2022 Exempt values should be equalized with taxable parcels

Data should be collected in a manner that provides for the annual revaluation of estimated market values for exempt properties annually and consistently with taxable properties to reflect market changes and physical changes as of January 2nd each year starting with the 2022 assessment. All exemptions, including 3-4-5 wetlands require approval by the County Assessor.

Hennepin County is in the process of building an exemption module comparable to OneHomestead, additional changes may occur as Hennepin County continues to build out the exemption module.

Homestead

Access to Social Security Numbers through OneHomestead or Hennepin County Property Information System (PINS) will require background check by August 1, 2021. Additional changes potentially in process as Hennepin County continues to improve the functionality in OneHomestead.

Primary Groupings

Conversations will continue with the Big 7 assessors and Hennepin County about the best way to track and submit primary grouping information.

Quintile Plan

- Including inspections conducted for reasons other than quintile as quintile compliant
- Jurisdictions should have a plan in place to have digital sketches and photographs for all properties
- Quintile plan should include all taxable and exempt parcels

Personal Property

Discussions with city assessors are in process to determine the best format for submitting personal property assessments. Currently being proposed is for Hennepin County Assessor's Office to provide an excel document for cities to update in place of the mainframe files or report format requested below.

Reporting Assessment Submission Data Expectations

- Standard outline/template will be provided for assessment narrative
- Proposed discussion on how to best align on water indicators/data and state property types

Use Codes – Commercial, Industrial and Apartments

Minor use code changes made to commercial properties, particularly exempt properties. Parcels should be updated to reflect new use code changes as described in the Use Code Handbook. Changes will be made in the way use codes are grouped in the comprehensive report and annual report.

2022 Version 1.1

2022 Assessment Priorities – Additional areas to be reviewed: Grouphomes – defining living area

Background Checks – Clarifying language added around background check requirements.

Exhibit B Fee Schedule – Added APEX Sketch \$120 Annual Fee

Primary Groupings/Associated Parcels

Additional definition added for the term primary groupings. Primary groupings can be used interchangeably with associated parcels which represents parcels associated together for valuation purposes or that are part of a larger economic whole. These are parcels that are difficult to sell separately since they support the function of each other and are sold together.

2023 Version 1.0

No Significant Updates

2023 Version 2.0

Update Brooklyn Park Priority Item

General Expectations

Our mission is to value and classify property, uniformly and accurately.

To ensure consistent assessments and assessment practices across the county, all assessment offices in the county are expected to follow the policies set by the Hennepin County Assessor in this and other documents. In addition, all Assessors must comply with the Department of Revenue and adhere to all legislative mandates and statutes including the State Board of Assessors Code of Conduct. These policies apply to all assessment office personnel in Hennepin County.

Communication

The County Assessor will serve as the liaison between the Minnesota Department of Revenue (DOR) and all other assessors and assessment staff in Hennepin County. Questions and requests for DOR shall be submitted through the County Assessor. Assistance with questions pertaining to the process and procedures of assessment related activities should originate with the County Assessor or Assistant County Assessors/Managers who will advise you on your course of action.

Prior to contacting the County Assessor's Office please refer to the documentation on HennPlace, the Department of Revenue website and check your direct supervisor.

Customer Service

Please provide prompt, professional, and courteous customer service. Be available to respond to property owners, the public, government officials, county assessor staff and others regarding assessment or appraisal issues and inquires during regular business hours.

Data Requests and Annual Data Submissions

Details on annual data submissions are detailed within this document. Hennepin County will incorporate all data received within the requested timeframe to meet the needs of PRISM, MetroGIS or any other relevant countywide data request. If additional data is needed, Hennepin County may issue a request to city assessors and will work with the assessor to establish a reasonable timeline.

Data Privacy and Security

Minnesota Statutes section 13.51 makes certain information, such as documentation that includes social security numbers, rents, income and expense information, net rentable area, vacancy rates or locations of security systems, safes or safe rooms, and private data including medical information, protected data. All protected data collected, created, received, maintained, or disseminated is governed by the MN Government Data Practices Act and should be maintained in a secure environment at all times. Private data may not be transmitted via email or fax. Private data must be sent utilizing a secure data transfer, such as Secure File Transfer (AXWAY), or other method acceptable to Hennepin County Data Security policies. Under no circumstances may this data be copied, distributed, or otherwise viewed by the general public.

- **ACE (Assessor's Commercial Exchange) Reports:** Only the "public report" is permitted for distribution to the public.
- **August 1st Income and Expense Data:** Minnesota statute 278.05(6).
- **Social Security Numbers:** Background check is required to access Social Security Numbers. Hennepin County will be auditing the transfer and storage of SSN's and providing recommended "best practices".
- **Multiple Listing Service (MLS) Printouts:** Utilization, sharing and printing of MLS documents or photographs are strictly prohibited by the MLS. Printouts from the MLS should not be copied or provided to other assessor's, city officials or taxpayers under any circumstances.
- **Safe at Home** - Is an [Address Confidentiality Program](#) which makes all identity and location data on a program participant private data.
- **Veteran's Exclusion and Special Homestead:** Participants eligibility is based on medical criteria which is protected information.
- **Working Data** – Sensitive information, such as taxpayer's phone numbers or email addresses, working files or draft appraisal grids, are for the use of the Assessor's only and should not be distributed.

Jurisdictions with Populations Under 30,000

To make processes uniform and accurate, all local and county-assessed jurisdictions under 30,000 in population shall follow the same assessment submission procedures, processes, and timelines.

Assessors within these jurisdictions are required to use the Hennepin County Vision CAMA system, mobile collection application and other programs as prescribed by the county. Characteristic changes and inspection data on all properties, including all commercial, industrial and apartment property data, must be tracked timely and accurately in the Vision CAMA system. For residential properties, assessors must consistently apply residential qualities and other subjective measures according to the Residential Quality and Field Card instructions provided by Hennepin County as well as utilize the appropriate methodologies for valuing residential land including neighborhoods, site adjustments, ag curves and lakefront effective frontage curves.

In addition, assessors must meet with County Assessor representatives prior to assessment submission to review completion of the Assessment Checklist and assessment levels.

Meetings and Trainings

Attend and participate in all meetings, training sessions and information sessions when offered or recommended by the Hennepin County Assessor's Office.

This includes, but is not limited to, the following:

- Monthly HAM Meetings
- Quarterly Assessment Program Meetings
- Fall Ratio and Truth-in-Taxation Meeting
- Residential Assessment Meetings, i.e., Ag Meeting, Lakeshore Meeting as needed
- Commercial, Industrial and Apartment Meetings as needed
- Instructional sessions relating to new technologies and software as needed
- Specialized and Individual Training as needed (may incur a fee)

Requirement to Verify Local Assessment Work

Minnesota Statutes, section 273.064 requires the County Assessor to examine the appraisal records of city and local assessors any time after December 1 of each year. If deficiencies in quantity or quality of assessments raise suspicion of questionable assessment practices, inadequate records and/or complaints from local property owners are discovered, the assessors will be required to correct the deficiencies. If corrections are not satisfactory within 30 days, the county can perform the work needed to correct the assessments and may bill the taxing jurisdiction for the cost of the reassessment. In the unfortunate event that this occurs, the following process will be followed:

- A written warning will be given to the local or city assessor, when appropriate for the level of infraction. The warning will identify the infraction and, as appropriate, detail future expectations, specific corrective action, and a compliance date.
- For repeated or more significant deficiencies a written warning will be given to the city assessor with a copy of said warning sent to city administration, city council and/or the county board. The warning will identify the infraction and, as appropriate, detail future expectations of performance and behavior, specific corrective action and a compliance date.
- Failure to remedy the infractions as directed in the warning, by the prescribed date will require corrective actions by the County Assessor, with billing to the jurisdiction for the full cost of correcting the deficiency.

Hennepin County reserves the right to verify expectations are being met using various methods including data audits and resident interview. The degree to which assessor expectations are met or deficient will be tracked and reported to City Council and Administration.

Assessment Administration

Assessor Disclosure Forms

The Code of Conduct and Ethics for Licensed Minnesota Assessors prohibits assessors from accepting appraisal assignments in which the assessor is related to the owner as a spouse, parent, or child, by blood or by marriage, or in which the assessor has a financial or other interest in the property. Each member of the Assessor's Office must complete an Assessor Disclosure Form for each jurisdiction they assess. All conflicts must be noted, and alternate assessors should be identified for those conflict properties.

Disclosure forms must be returned to County Assessor 30 days after a new hire or immediately after any change. Forms for all Assessor Office personnel are required to be submitted by May 28 on even years along with any updates to the Staffing Report.

Assessment Submissions

2023 assessments should be submitted to the County Assessor no later than **January 20, 2022**. Jurisdictions may request a January 23rd submission date. Specific timelines by city will be distributed in fall for cities assessed by Hennepin County and locally assessed jurisdictions under 30,000 in population.

Please include the following information along with the assessment submission:

- Market condition adjustments, any breakdown of the adjustment used, and corresponding MCAP ratios. Electronic copies of the Residential & CIA assessment summaries including expected statistics and ratios.
- List of staff with role and designation, involved in the creation of the assessment.
- A thorough write-up explaining each segment of the assessment.
- Any annual data submissions listed as required in the Data Expectations section of this document

The submission process to PINS will remain the same as prior years. The initial assessment submission and one resubmission, if needed, have no charge. Assessors will be charged \$1,000 per additional resubmission beyond the first.

Hennepin County will provide an update portal on HennPlace for the submission of annual assessment documents. [Assessor's Office - HennPlace - Assessment Tracking - All Documents \(sharepoint.com\)](#). This link may change for the 2023 Assessment. City assessors who do not have access to the Hennepin County network or HennPlace Assessment Library may submit annual assessment documentation may submit through email using ao.annualfiles@hennepin.us.

Disparity Reductions

The work of our organization deeply focuses on the people of Hennepin County. While many of our residents enjoy the great quality of life this region gets recognized for, we cannot be blind to the fact that stark disparities exist – particularly for our residents of color.

Hennepin County defines disparities as differences in areas of life that result in one group having a disproportionate burden of negative life outcomes. It's our commitment that we will reduce these disparities.

Reducing any individual disparity can leverage positive change and help reduce disparities in other areas. If one gear turns, they all move. These seven domains are interconnected and integral to reducing disparities.



Ensuring all property is valued and classified fairly and equally ensures no one group pays more than their fair share in taxes and supports the housing and income domains. More information about how Hennepin County is committed to disparity reductions can be found on the Hennepin County website [Addressing disparities in Hennepin County | Hennepin County](#).

Divisions and Combinations

Please complete within 30 days, exceptions are allowed for more complex divisions such as Green Acres and multi-family projects such as condos or co-ops. Please complete more complex divisions in a timely fashion.

Exemptions

City Assessor's shall accept original applications and forward the application and all relevant information to Hennepin County in a timely manner. Parcels can only be exempted with formal approval by the county assessor and through the prescribed change authorizations process. Taxable parcels may not be exempted through the division process, add & delete process or assessment submission process. Parcels qualifying for exemption in these scenarios should continue to be treated as taxable until the exemption has been approved by the county assessor. Properties may not be exempted through the annual assessment submission. This is applicable to all properties and exemptions, including partial exemptions for 3-4-5 wetlands.

Assessor's must maintain and update the property characteristics and values of all exempt property in your jurisdiction's database.

Cities should maintain property data for exempt properties in the same manner as taxable property data. Expectations for the exempt assessment include having full property record details for all exempt parcels including:

- Land and neighborhood data
- Building characteristic data
- Digital sketch and photograph

- Exempt values should be equalized with taxable parcels

Data should be collected in a manner that provides for the annual adjustments of estimated market values for exempt properties annually and in concert with taxable properties to reflect market changes and physical changes as of January 2nd.

Homestead Classification, Special Homesteads and Social Security Number File

Homestead applications should be processed upon receipt. Changes should be submitted to the county as they occur. The final day for electronic submission is distributed annually.

Inspection Guidelines

Whenever possible and as a best practice, advanced notification should be provided to property owners before entering the property. This may be in the form of a letter or post card mailing.

When performing inspections, all staff are expected to carry identification, proof of assessment licensure, business cards and other equipment necessary to perform a complete and adequate inspection of the property. Hennepin County recommends appraisers always wear safety vests when in the field.

Additional inspection guidelines can be found in Hennepin County Quintile Plan (Appendix A).

Licensure

Assessors are expected to maintain the appropriate State Board of Assessor's designation, license level and income certification. When interns are utilized for physical inspections, the final approval of any subjective changes suggested by the intern must be reviewed and approved by a certified assessor assigned to the jurisdiction. Assessing jurisdictions must report to the county the license level of each staff member as part of the quintile report.

Local and County Appeal and Equalization Boards

Please read and adhere to the DOR "Board of Appeal and Equalization Training" Handbook.

Conduct valuation reviews prior to the LBAE meeting, attend and participate in your LBAE meeting and perform review appraisals as requested by the LBAE. All cities must comply with Department of Revenue policies regarding their Local Board of Appeal and Equalization (LBAE) or Open Book meetings. Any party that contacts the assessor prior to a LBAE, or who attends a LBAE meeting without an appointment, must be permitted to participate in the appeal process at the local level. All required documentation is due to the County Assessor within five business days of the meeting adjourning, but prior to County Board application deadline.

Please provide property record information and cooperation to county staff during appeals and reviews.

Managed Forest Land

Property type **LM** was added for managed forest lands. These properties receive a class rate of 0.65%. This property type is effective beginning with the 2019 assessment.

Manufactured Home Parks

Property type **ME** was added for manufactured home parks with a qualifying education certification. These properties receive a class rate of 1.0%. This property type was effective beginning with the 2018 assessment. All other manufactured home parks subrecords should receive a property type of **MH** with a class rate of 1.25%.

Migrant Housing

Property type **FH** was added for migrant housing. These properties receive a class rate of 1.00% on the first \$500,000 in estimated market value in 1.25% thereafter. This property type is effective beginning with the 2019 assessment.

Minimum Assessment Agreements

Cities above 30,000 must forward to the County Assessor upon receipt. Cities under 30,000 are handled directly by Hennepin County.

New Construction Improvements

Physically inspect and value all new construction, additions, and renovations each assessment year and submit new construction amounts with the initial assessment. Retain pertinent data regarding the improvement such as: written details of the improvements, permit information, percentage completed for partially completed projects, improvement amount calculations and updated digit photos and sketches.

Non-Homesteaded Agricultural Residences (2-3 Units)

Property type **FM** was added for non-homesteaded agricultural residences with two or three living units. These properties receive a class rate of 1.25%. This property type is effective beginning with the 2019 assessment.

Non-Profit Commercial Properties

Qualifying non-profit commercial subrecords should be assigned a property type of **NC**, **ND**, **NI** or **NP**. Congressionally chartered Veterans' Organizations that own/operate property, receive a class rate of 1% and should have a property type of **NC** if donation or **NI** if non-revenue. These property types were effective beginning with the 2018 assessment. Community organizations receive a class rate of 1.5% and should have a property type of **ND** if donation or **NP** if non-revenue.

Parking Lots

Parking lots should be submitted as an improved property type such as C, I or A with a minimal value of \$1,000 or as deemed appropriate. A use code of 116 should be utilized. Year built should be reported for parking lots as the year built of the primary structure. Conversations will continue with city assessors and Hennepin County about the best way to track and submit associated parcel/primary grouping information. Primary groupings can be used interchangeably with associated parcels which represents parcels associated together for valuation purposes or that are part of a larger economic whole. These are parcels that are difficult to sell separately since they support the function of each other and are sold together.

Personal Property Accounts

Coordinate creation and cancellation of personal property accounts and transfer of valuation and classification data with the appropriate Hennepin County staff. Personal property account values, classification and chaining must be reported by February 1st of the assessment year.

Preferred Commercial Class

The first 100,000 of each parcel (in any contiguous commercial chain) of commercial/industrial property is exempt from the State General Levy. Includes all Real Estate Parcels and Personal Property Accounts that have C, I, LC, LI, CR, and U subrecords and are a part of a chain, should be included. Each chain is considered Series 1, and the Sequence is 1 for the primary PID Subrecord 1, and then sequentially increases for each subrecord for all the PIDs in the Series (Chain).

Verify ownership of qualifying property as of January 2 and track all preferred classifications including the contiguous indicator, primary parcel and series & sequence numbers. This will override the contiguous indicators on the final assessment. Primary parcel, series and sequence numbers are submitted separately from the text file with the annual assessment. Details regarding the reporting of series and sequence data is included in the Data Expectations section of this document.

Property Records

Maintain updated property records for all taxable and exempt properties in your jurisdiction's database. Property records should include the following information:

- Current and historical classification, valuation, and improvement amounts
- Property characteristics
- New construction and partial completion documentation.
- Inspection history
- Property photo and building sketches, preferably stored in digital format
 - Photo(s) must represent the current condition of improvements as of the assessment date
 - Building sketches should be scalable, drawn in an electronic sketching program (eg, Apex Sketch) and must represent the status of all improvements as of the assessment date. Copies of site plans, blueprints, etc. are not building sketches.
 - The scalable sketch is used to determine size of improvements
 - Building sketches must show detail of all improvements. Residential sketches should include additions, decks, patios, porches, etc

Quintile Compliance

Minnesota statute requires the assessor view all taxable, exempt and state assessed property, at maximum intervals of five years.

Updated Department of Revenue guidelines on quintile compliance now allow for the inclusion of inspections for other purposes, such as new construction, sales verification, Local Board of Appeals/Open Book, and Tax Court reviews when the rigor and detail of inspection is equivalent to that of a quintile inspection. Updates have been made in the Quintile data reporting requirements in the back of the document.

Hennepin County expects that all properties will be valued annually.

The minimum expectation is that all parcels are verified for proper classification based on ownership and use of the property, all tax programs are extended to the owner/property and all property attributes are correct. It is also important to use the physical review and inspection process to check for omitted or undervalued property. Aerial photography and maps should be utilized to assist in identifying these properties.

All jurisdictions will maintain a five-year plan to complete the quintile and a yearly work plan for submission with their annual assessment which identifies:

- Details regarding the locations and property types included in each annual quintile to be completed in the 5-year cycle
- Hennepin County recommends using geographic quintiles such as section, quarter-quarter, or neighborhood which include all parcels and property types, including vacant land and exempt properties.
- Updates to Quintile plans to rectify items of concern identified by the Hennepin County Assessor, Department of Revenue Property Tax Compliance Officer or State Board of Appeal and Equalization should be submitted by May 28th.

Please review Minnesota Statute 272.03, subdivision 1 and the Quintile Review Process in the Property Tax Administrators Manual Module 1 when developing this plan. Please see the Data Expectations section of this document for more details on submitting the quintile plan to Hennepin County.

Residential Condominiums and Co-Op Classification

An **AX (Apartment Conversion)** property type is used when an apartment property is converted to individual parcels as condominium units. A parcel maintains the AX status and is valued as an apartment either until the parcel is sold or until 60 percent or more of newly created individual residential units have been sold as condominiums; including those units that the converters retain for their own investment. At which time all remaining parcels are valued and classified as X. Retained units are defined as completed units that are rented and no longer available for sale.

Effective with the 2017 legislature, any non-commercial garage condominium storage units that have separate PID shall be 4bb. Please use an **XM** property type on these subrecords. Condo garages shall also receive an XM property type.

For Limited Equity Co-Ops, where rules and regulations control purchase and sale of shares, submit individual unit values on their respective pids with a property type of XC. For Market-Rate Co-Ops, where Shares for individual units are bought and sold by the share owner at the prevailing market price, use a property type of X (Condominium).

Railroads and Utilities

For **CR** (Operating Railroad) properties, it is important to submit subrecords with \$0 in value for the land, building and machinery values. Non-Operating railroads should be classified with **C, I** or another appropriate property type and should not receive a CR subrecord. For **U** (Utility) properties, submit an estimated land value with the initial assessment. However, it is important to set the building and machinery values to \$0. State Assessed values will be loaded into PINS when received from DOR.

Residential Misc/Multi Unit Non-Homestead

The **RM** (Residential Misc) can also be used to represent the non-homestead property in the scenario in which there are two individual residential units on a single parcel.

Sales Verification

All assessors and staff appraisers performing sales verification are expected to read and review the Hennepin County Assessor's Sales Verification document and the DOR's Sales Ratio Criteria each year for the relevant ratio studies period. Sales in the assessor's jurisdiction shall be verified by the assessor or their appropriate staff members. Sales verifications and sale code changes should be completed and submitted to Hennepin County according to the prescribed procedures and timeframe. Please note the processes and sales transfer schedule in the Hennepin County Assessor's Sales Verification document applies to both residential and commercial sales.

All known data should be entered into ACE within 30 days of acceptance of a sale. A completed ACE record of sale should be finalized within 60 days of acceptance of the sale and communicated to County Assessor's Office. There will be times just prior to final eCRV processing in which the assessor will be expected to process eCRV's on a daily basis.

Please note that eCRV is the source of truth for property types and on water status in the state calculation of time trends and the sales ratio study. Assistance identifying discrepancies can be provided upon request. The County Assessor has final authority on all sales verifications.

Use Codes - Residential

All cities are expected to provide a corresponding property type or use code for any residential property in a special program that is represented with a masked property type code. This is to ensure these parcels are analyzed and reported in accordance with other similar property types. For cities using Vision CAMA the property type should be updated on the land line. Cities not using Hennepin County Vision CAMA, should provide this information as described in the Data Expectations section of this report.

Special property types include: B, BJ, D, DJ, HR, HS and S. This list of property types may change with legislative changes.

Use Codes - Commercial

Minor changes were made in 2021 to CIA and exempt use codes. All commercial, industrial and apartment use codes are described in the [CIA Use Code Guidebook](#). All Assessors in Hennepin County are required to track and report an accurate use code on all commercial, industrial and apartment properties. Use codes will continue to be utilized even more frequently in reports and during the assessment approval process.

Valuation Notice Printing/Mailing

Jurisdictions that are printing their own valuation notices should follow the format prescribed by DOR and Hennepin County and should provide a copy to Hennepin County.

Valuation Practices

Value all parcels annually to meet assessment requirements set by the County Assessor, the Department of Revenue, and USPAP (Uniform Standards of Professional Appraisal Practice). All valuations should be generated using generally accepted appraisal methodology, considering the highest and best use (HBU) and fee simple, market value in exchange.

Computer Systems and Devices

All Assessor's in Hennepin County are required to use and maintain adequate systems, applications, workflows and databases as prescribed by the Hennepin County Assessor's Office, and the MN Department of Revenue. Any subscription and hardware costs are the responsibility of the assessor.

Please note Hennepin County Information Technology Rules apply to all Hennepin County Systems. All system users must have individual log in accounts for all systems.

Systems utilized by assessors in Hennepin County include but are not limited to:

- **PINS – Property Information Numbering System:** Hennepin County system utilized for processing homestead and change authorizations. All assessment offices are required to maintain a subscription and utilize PINS or any future replacement system. Effective August 1st 2021, the successful completion of a background check is required for access to social security numbers.
- **ACE – Assessor Commercial Exchange:** A confidential application utilized by metro assessors to exchange sales information and data for commercial, industrial and apartment sales.
- **eCRV – Electronic Certificate of Real Estate Value:** MN Department of Revenue system utilized for recording and distributing sale information.
- **TaxSys – Hennepin County Property Tax Petition System:** Hennepin County Attorney's Office countywide system for communicating between assessors and county attorneys, maintaining the details, status, assignment and resolution of tax court petitions.
- **Vision CAMA & Mobile Data Collection Solution:** Hennepin County application for collecting data, calculating values and analyzing sale information.
- **RecordEASE – Land Records Search:** Hennepin County Recorder's Office online document records search. Local assessors must use their own RecordEASE subscription to search for public records. County Staff is not authorized to conduct searches on behalf of other assessment offices or for non-county business.
- **Axway – Secure File Transfer:** Approved methods for transferring and exchanging confidential data with Hennepin County.
- **Hennepin County OneHomestead System –** System is used to track Homestead applications and has a portal for taxpayers to submit Homestead application. Effective August 1st 2021, the successful completion of a background check is required for access, as described in the OneHomestead Agreement signed by city administration.
- **HennPlace:** Internet based collaboration site for sharing files, processes, and procedures with the assessor's throughout Hennepin County.

Hennepin County Devices

Users are required to abide by Hennepin County Assessor's Office and IT rules and fee schedules pertaining to Hennepin County laptops, tools, and data collection devices. Outside assessors using Hennepin owned devices will be billed an annual fee to cover the cost and support of the device. **Hennepin County computer usage guidelines must be followed by anyone using Hennepin County hardware or equipment.**

Background Check Requirements

Background checks are required for all individuals accessing private data, such as social security numbers as a normal part of their job in Hennepin County systems. The initial background was required to be completed and certified by the employing jurisdiction by August 1, 2022. Cities will be required to certify that background checks have been completed every 3 years.

The background check verbiage in the Homestead User Agreement identifies multiple types of background checks that may be used. The purpose of this is to provide the city flexibility in how the check is completed. Cities should not share any private data from the background check with Hennepin County.

Background checks should be at a level that would allow the city to certifying that the individual does not have any criminal history in areas such as fraud, finance, identity theft, etc that would indicate a potential risk to the security of the county data.

Assessment Expectations and Analysis

Assessment Expectations Overview

The 2022 Sales Ratio Criteria published by the Minnesota Department of Revenue details the minimum expectations for all assessors within the state for the 2022 assessment. This report touches on the methodology and reasoning for standard statistics calculated by both the Department of Revenue and the Hennepin County Assessor's Office, as well as instructions on calculating market-adjusted sale prices and more. An annual copy of the report can be found online at [Sales Ratio Studies | Minnesota Department of Revenue \(state.mn.us\)](https://www.revenue.state.mn.us/sales-ratio-studies)

The County Assessor will be analyzing all assessments submitted at the end of the year for a level of uniformity and accuracy beyond the minimum prescribed by the state. Assessors should target slightly above a 95.0% market adjusted median ratio. An overall median sales ratio of 95.0% is the minimum level of assessment accepted for major market segments, such as the All Residential study. **Overall assessment levels must be at or above 95.0% to receive approval for the 2023 Assessment.**

Please contact the County Assessor prior to submitting your assessment if there are unique situations or segments of the assessment that will not meet the prescribed requirements.

While hitting the sales ratio median targets established by the County Assessor is important, assessments will be reviewed holistically for other measures of equity and uniformity. One key measure that will be analyzed is consistency and uniformity of year-over-year change for similar property types both within and between cities, particularly for commercial and industrial properties.

Small exceptions to missing the sales ratio target may be made by the County Assessor on a case-by-case basis for small sample sets if a city can demonstrate that it is moving a property type in line with sales of similar properties countywide. Exceptions may be made for property ratios outside of the prescribed target if the sales themselves are not representative of the overall property type. For example, if a big box retail property and a fast food restaurant represent a jurisdiction's sales data for a give ratio period and the city can demonstrate the following: the sales data is valued in accordance with other like properties within a city, the values are uniform on a countywide basis with other like properties, and median ratios of like properties are in the prescribed ratio targets of the County Assessor.

Conversely, even if a city hits the target ratio for a particular property type, the assessment may still be sent back for review if it is determined that properties were not moved uniformly for that property type within the city or were not moved in line with similar properties countywide. If a city has no sales of a particular property type, they are expected to look at other sales countywide to gauge market movement for that property type. For example, if a city on Lake Minnetonka has no duplex sales but other cities around the lake are moving duplexes approximately 10%, then that city should move their duplexes accordingly.

All cities are expected to communicate and coordinate with each other to ensure equalized valuations on similar properties throughout the county. Standard reports will be provided by the Hennepin County Assessor's Office to facilitate the sharing of market information between cities. Assessments are expected to be equalized with neighboring cities or cities countywide depending on the property type.

Disparity Reduction

Hennepin County administration is focused on reducing disparities among residents of all jurisdictions throughout the county and has made this a goal of primary importance.

The Hennepin County Assessor's Office has committed to several strategies to reduce disparities, one of which is ensuring a uniform and equalized assessment. Uniformity and equalization in property valuation ensures that everyone pays their fair share and prevents the shifting of tax base between jurisdictions. **Uniformity** throughout the assessment ensures that similar properties are valued similarly. **Equalization** ensures that all property is valued at an equal level of assessment throughout all taxing jurisdictions and that the assessment favors neither high nor low valued properties.

Sales Ratios

Per the MN DOR, a median market-adjusted ratio between 90.0% and 105.0% is considered within compliance for the State Board of Equalization. However, it is expected, but not guaranteed, that the market adjusted assessment-to-sale ratio target for all cities and property types within Hennepin County will be under 100.0% with direct sale prices and at least a 95.0% with market-adjusted sale prices. A normal distribution of sales ratios is expected.

Expected Mean & Median Ratio Targets:

- 95.0% market adjusted median ratio is the minimal level of assessment accepted for overall assessment levels
- Less than 100% direct median ratio
- Sales should have a normal distribution
- Range of mean and median ratios normally within 2-3 percent

The target for sales ratios will be set by the County Assessor at the October Hennepin Assessor Monthly Meeting. When significant differences are found between the time trends of different property types, the jurisdiction may calculate and apply the time trends at a more granular level such as for specific property types or geographic areas within the jurisdiction. The overall adjusted median still needs to meet the targeted market adjusted ratio.

Direct Inferred Ratios

Historic DOR 'All Residential' direct inferred must be above 90%. Inferred ratios for all other property groupings are expected to be above 90%. Cities with a direct inferred ratio of less than 90% for a property grouping, without an adequate explanation, will be sent back for further review.

Coefficient of Dispersion (COD)

Assessments with unusually tight CODs for a property type will be flagged for further review. Hennepin County Assessor's Office will calculate CODs for internal review without removing extreme ratios. Extreme ratios will not be removed in the DOR's final analysis starting with the 2020 assessment.

Uniformity among Strata

Ensuring uniformity in assessment levels among strata also is important. The level of assessment of each stratum (class, neighborhood, age group, valuation tier, and the like) should be within 5 percent of the overall level of assessment of the jurisdiction. For example, if the overall level of assessment for all residential property

type is 100%, but the assessment level for duplexes is 93% and the assessment level for townhomes is 106%, the jurisdiction is not in compliance with this requirement.

Sales Change/Growth vs All Parcel Change/Growth

Aggregate growth of sale properties should be within 150% of all parcel sample growth. For example, if the overall property type growth is 6%, sales growth of over 9% will start to be cause for concern. Sales growth over 12% will cause significant concern.

Any jurisdiction that submits an assessment where sale change and all parcel change within a property type noticeably differs should submit an explanation for the discrepancy with their assessment. Sale changes that are double the all parcel change, or vice versa, may require additional explanation. The tolerance for discrepancy between these two measures will shrink for property types with a large sample set of sales.

Comprehensive explanations must be provided with the assessment submission when the tolerances are exceeded.

Uniformity in Growth

Attention will be given to the uniformity of growth of similar properties both within and between jurisdictions. If there are no sales in a jurisdiction, property growth should be in line with the typical growth patterns seen throughout the county.

Vertical Equity

Price-related differential (PRD), Price-related bias (PRB) and net sale price stratifications will be receiving extra attention in accordance with Hennepin County's commitment to disparity reduction in our communities.

Price Related Differential

The target for PRD is 1.005.

The price related differential (PRD) is an indicator of vertical equity. The PRD is a relative comparison of all ratios in a set of sales. The acceptable range for a PRD is between 0.98 and 1.03. A PRD less than 1.00 indicates progressivity, and a PRD greater than 1.00 indicates regressivity. PRD's outside of this range may require further review. PRD's outside of 0.95-1.05 are generally not acceptable.

Price Related Bias

The target for PRB is 0.0.

A PRB of greater than +0.03 or less than -0.03 may indicate a bias.

A PRB of greater than +0.05 or less than -0.05 is cause for further inspection.

The PRB is a trend or an approximation of how ratios change as property values double. DOR encourages jurisdictions to focus their attention on the PRB because it provides an indication of vertical equity and quantifies the extent of any potential inequity. The PRB is also less susceptible to outliers than the PRD. The above ranges will be judged based on a 90% confidence level, must be have significance of 90% or more based on the p-value, and the jurisdiction must have 30 or more sales.

Reporting

The Hennepin County Assessor's Office will be providing a series of standard reports throughout the year to better assist appraisers in reviewing market trends countywide and not just within their own city.

Reporting

Historically, the logic in Ten Box and HAMM reports group sales differently based on PINS property types. The HAM reports are using the property type from the highest valued subrecord on the highest valued PID in the sale. For MCAP prices in these reports, these property types are used to determine which state trend is applied to the sale. Ten Box reports groups sales based on the property type of the first subrecord unless the second subrecord is CIA and has more value than the first subrecord, then the second subrecord is used to determine property type grouping. The DOR applies trends based on the primary property type indicated on the eCRV. This has led to differences in the trend applied to the sale by the state versus the trend applied internally.

- When stratifying sales by PINS property type, use the property type of the subrecord with the greatest Estimated Market Value on the Primary PID of the sale in all reporting
- For reports that stratify sales based on internal property types or other characteristics, still only apply the same trend that the state would. Do not change the trend applied no matter how the sales are stratified by property type. Note: this means that different trends may be applied within the same property type stratification. For example, an RL PID that does not have an on-water indicator on its eCRV would not get the wet trend applied. That RL PID with a dry trend applied would still be grouped with other RL PIDs with wet trends applied on the Ten Box.
- Reports can be provided to help identify discrepancies between eCRV and county data upon request

The county is currently reviewing if data submission changes should be made to improve in the accuracy of unmasking property types, identifying on water properties, calculating wet trends and PRISM reporting. These discussions will cover the collection and identification of DNR Lake Codes and Water Influence codes as reported in eCRV (1-lake, 2-River, 3-swamp, 4-other, 5-stream/creek or pond). And confirming river properties are included in the current residential data request.

Commercial/Industrial/Apartment (CIA) Sales List

A sales list of all Commercial, Industrial and Apartment sales throughout Hennepin County will be distributed beginning mid-summer. The report will include all sales marked as qualified or not reviewed in eCRV at the time of the creation of the report. This report will be re-distributed regularly throughout the remainder of the year.

Preliminary Ratio Report

Preliminary ratio reports comparing 2022 assessed values to prices of sales occurring during the 2023 sales ratio study period (October 1, 2021 – September 30, 2022) for residential, commercial, apartment and industrial property types will be created and distributed monthly from May through the end of the year.

Preliminary Trend Report

Preliminary market condition trends will be calculated and distributed in October and December utilizing sales data from the state's list. Trends will be calculated in accordance with MN DOR's 2022 Sales Ratio Criteria report. To be considered significant, a trend must be computed on at least 30 sales with a p-value of less than 0.1. Preliminary trends will be calculated by city, region, and/or county for the following property type groupings:

- Residential Single Family – Off Lake
- Residential Single Family – On Lake
- Residential Single Family – All
- Residential Condominium
- Residential Townhome
- Residential Zero Lot Line
- Residential Duplex/Triplex
- Residential – All
- Commercial
- Industrial
- Apartments

Ten Box

The Ten Box and all other assessment approval reports will utilize sales from the preliminary final state sales list provided by DOR.

Supplementary Analysis Reports

Supplemental analysis reports based on use code and other required data characteristics will be produced to compliment the Ten Box analysis. These reports will be like the reports produced for the 2023 assessment with a focus on analyzing commercial, industrial and apartment assessments.

Annual Assessment Report

The 2023 Annual Assessment Report will be based on the data submitted to Hennepin county by mid-February 2023. The Hennepin County Assessor's Office intends to finalize and distribute this report during March/April 2023.

PRISM

Spring submission of PRISM will use data submitted to Hennepin County by mid-February of the current assessment year.

2023 Assessment Priorities and Watch List

Results of the 2022 Assessment Priorities and Watch List have been added as an Appendix D.

Jurisdiction(s)	Description
All Hennepin County Jurisdictions	<p>Disparity Reduction – Outstanding improvement in PRB’s and regressivity were made again for the 2022 Assessment. This is an ongoing goal of the Hennepin County Assessor’s Office. An emphasis will be placed on statistical measures used to measure equity amongst and between segments of the market. Additional emphasis will be placed on PRB and improving equity in valuation of the lowest valued segments of the market.</p> <p>All jurisdictions will be required to describe efforts taken to meet disparity reduction goals as an ongoing requirement.</p> <p>2022 Status Update/2023 Assessment Requirement: This is an ongoing goal for Hennepin County. All jurisdictions met the minimum requirements for the 2022 Assessment. Hennepin County leadership will continue to work with all cities to improve comprehension and continue to make improvements in this area as an ongoing priority for Hennepin County.</p>
	2023 Assessment Work Order: Review of all marinas for valuation and equalization.
	2023 Assessment Work Order: Review daycare centers for valuation and equalization.
	<p>2022 Assessment Work Order: Commercial, industrial and apartments land review. Complete review of land values for vacant and improved parcels to improve accuracy and equalization.</p> <p>2022 Status Update: Work order is complete. Jurisdictions should continue to review land values as a part of normal quintile and assessment completion work.</p>
	<p>2022 Assessment Work Order: Outdoor storage properties. Review for correct property type, accurate and equalized values.</p> <p>2022 Status Update: Work order is complete. Jurisdictions should continue to review outdoor storage properties as a part of normal quintile and assessment completion work.</p>
	<p>2022 Assessment Watch Continues: Commercial Assessments</p> <ul style="list-style-type: none"> • 2022 Assessment Watch: County inferred property type median growth is low (87.6%) • 2022 Status Update/2023 Assessment Requirement: Countywide inferred property type ratio is acceptable (92.6%). Maple Grove, Minnetonka, Bloomington, Brooklyn Center, Mound, Hopkins & Richfield had inferred median ratios below 90%. • 2022 Assessment Watch: Property type growth is too low across the county as well is in most individual cities • 2022 Status Update/2023 Assessment Requirement: Property type growth has improved, some instances still exist where excessive sales

	<p>growth and low inferred ratios indicate property type may be on the low side.</p> <ul style="list-style-type: none"> • 2022 Assessment Watch: Sales growth regularly exceeds 150% of property type growth in many individual cities • 2022 Status Update/2023 Assessment Requirement: Sales growth exceeding 150% of property type growth Countywide. Sales growth exceeds 150% in aggregate and median parcel growth in the following cities: More than half of the cities that have commercial sales ratios. • 2022 Assessment Watch: These trends were seen in across all Hennepin County, Suburban Hennepin and most cities • 2022 Status Update/2023 Assessment Requirement: Improvements in the commercial assessment are recognized and appreciated. There are still some areas with room for improvement, the improvements made in many cities are commendable. <p>2022 Assessment Watch Continues: Improvements expected in these areas. Explanations are required when statistical tolerances are exceeded.</p> <p>2022 Status Update/2023 Assessment Requirement: Significant improvements were made in regressivity, property type growth and acceptable inferred ratios in the 2023 Commercial Assessment. Countywide, particularly in several of the larger jurisdictions inferred ratios were low and sales growth was exceeding 150% of property type growth. Additional improvements are expected in these areas for 2023 Assessment.</p>
	<p>2022 Assessment Watch Continues: Apartment Assessment</p> <ul style="list-style-type: none"> • 2022 Assessment Watch: Suburban Countywide statistics indicate excessive sales (9.5%) to property type growth (2.3%) • 2022 Status Update/2023 Assessment Requirement: Suburban countywide sales growth (11.5%) compared to property type growth (7.4%) was a significant improvement in closing the gap between sales growth and property type growth. Which just slightly exceeds the tolerance expected of no more than a 150% percent excess of property type to sales growth. We acknowledge part of the spread between sales vs property type change is due to the shifting of value due to legislative change reducing the 4D tier limit and will be watched for 2023. • 2022 Assessment Watch: Excessive sales growth is specific to certain cities • 2022 Status Update/2023 Assessment Requirement: Countywide the gap in property type to sales growth has increased past the 150% tolerance to 163%. 14 cities have sales growth that exceeds expected standards. Sales growth exceeds 150% in both aggregate and median parcel growth in the following cities: Minneapolis, Richfield, Spring Park, Brooklyn Park, Minnetonka, Edina, Maple Grove. We acknowledge part of the spread between sales vs property type change is due to the shifting of value due to legislative change reducing the 4D tier limit and will be watched for 2023. • 2022 Assessment Watch Improvements expected in these areas. Explanations are required when statistical tolerances are exceeded.

	<p>2022 Status Update/2023 Requirement: Significant improvements were made in regressivity, level of assessment and COD's and sales growth. Countywide, particularly in several of the larger jurisdictions inferred ratios were low and sales growth was exceeding 150% of property type growth when measured both in aggregate and according to the median parcel change. Additional improvements are expected in these areas.</p>
	<p>2022 Assessment Watch Continues: Equalize growth between sale and non-sale properties. Significant number of cities and markets exceeding 150% growth between sale and non-sale properties for the 2021 Assessment. Additional emphasis will be placed on ensuring sale and non-sale properties are changing similarly in value. Explanation required when growth of sale properties exceeds 150% of property type growth.</p> <p>2022 Status Update/2023 Requirement: Dramatic improvement was made in this area for Residential markets. Explanations will continue to be required as normal course of business when growth of sale properties exceeds 150% of property type growth.</p> <p>Industrial Countywide, and all Suburban County statistics exceeding 150% difference between property type growth and sale properties. Countywide, Big 7 & all Suburban median parcel sale growth is within excepted tolerance. Hennepin County All Contract cities joint statistics exceed tolerances in aggregate and median sale vs parcel growth statistics.</p>
	<p>2022 Assessment Watch Continues: Limited Equity Coop. Continue to review for consistency. Confirm limited equity status of Applewood Points. Carry over from 2021</p> <p>2022 Status Update/2023 Assessment Watch: Watch remains in place for 2023 due to ongoing court case.</p>
<p>Additional areas of work identified for the 2022 Assessment to be further defined for the 2023 Assessment</p>	<ul style="list-style-type: none"> • Common Elements – Progress was made in year 1 for 2022 Assessment continue work for 2023 Assessment • Personal Property Accounts - Continue work for 2023 Assessment • Exempt Assessment – Complete for 2022 Assessment. Work should continue to maintain and value exempt parcels similarly to taxable parcels throughout the assessment cycle. • PILT- Primary project HCRRA complete -Continue for 2023 • Railroad -Continue for 2023 • UTA Parcels -Continue for 2023 <p>Value and classification of groups of individual PIDS where HBU is condo- Complete - for 2023 Assessment add review of single family/rentals/etc</p>
<p>Hennepin County Assessor's Office Contract Jurisdictions & Local Contract Assessor's</p>	<p>2022 Assessment Work Order Continues: Single Family Homes. Improve data quality for the interior of properties during quintile and new construction, especially for non-sale properties</p> <p>2022 Status Update/2023 Assessment Work Order: Work Order continues. Significant success was made should continue to be a goal for 2023 Assessment.</p>
	<p>2022 Assessment Order Continues: Effective Age Review. Establish and implement guidelines and parameters to ensure consistent application of depreciation.</p>

	<p>2022 Status Update/2023 Assessment Work Order: Work Order continues for 2023 Assessment.</p>
	<p>2022 Assessment Watch: All Residential/Residential Umbrella (Box 5) statistics frequently exceeding expected tolerances. The following trends were seen regularly in the Box 5 All Residential Statistics as well as in residential breakout's for R & RL property types (Boxes 6, 7, and 8):</p> <ul style="list-style-type: none"> • Sales growth regularly exceeding 150% of property type growth • Amount of property type growth was lower than expected resulting in inferred ratios below 94% • COD's below 4.0 <p>Overall, it appears too much emphasis on sales growth and changes, not enough growth on the universe of properties. Improvements expected in these areas. Additional explanations will be required for statistics falling outside of expected thresholds.</p> <p>2022 Status Update: Work order is resolved. Improvements were made in all areas. Jurisdictions should continue to strive to be within statistical tolerances. Explanations will be required as part of the assessment summary when statistics fall outside of expected thresholds.</p>
Brooklyn Park	<p>2023 Assessment Work Order: Use of geographic or market adjustment trends not calculated by the county require approval 2 weeks prior to assessment submission.</p>
Eden Prairie	<p>2023 Assessment Work Order: Work order on all water influence parcels. Ensure all properties with water influence and deeded access are coded as RL according to Hennepin County Policy. Improve quality of sales validations to ensure more equalized growth between sale and nonsale properties with water influence.</p>
Excelsior	<p>2023 Assessment Work Order: Need CI review & inspection as part of quintile</p> <p>2022 Assessment Orders:</p> <ul style="list-style-type: none"> • All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision • Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification • Review site adjustments and consolidate residential neighborhoods as appropriate <p>2022 Status Update: In process</p>
Greenwood	<p>2022 Assessment Watch: R & RL Review - History of large sales vs property type growth causing appearance of trying to catch up to the market. Analyze options of incorporating larger market area to drive assessment.</p> <p>2022 Status Update: Work order resolved. Continue goal of analyzing methods of incorporating larger market area to drive assessment.</p>
Long Lake	<p>2022 Assessment Work Orders:</p> <ul style="list-style-type: none"> • All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision

	<ul style="list-style-type: none"> Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification Review site adjustments and consolidate residential neighborhoods as appropriate <p>2022 Status Update: In process</p>
Maple Grove	2023 Assessment Work Order: All multi-tenant retail require full review
Medina	<p>2022 Assessment Work Orders:</p> <ul style="list-style-type: none"> All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification Review site adjustments and consolidate residential neighborhoods as appropriate <p>2022 Status Update: In process</p>
Minneapolis	<p>2023 Assessment Work Orders:</p> <ul style="list-style-type: none"> Ensure all properties with water influence and deeded access are coded as RL according to Hennepin County Policy. Ensure all properties meeting the criteria for Seasonal classification are coded as S according to Hennepin County Policy. <p>2023 Assessment Watch: Industrial MCAP Mean is at 85.9. Median and mean should be within 2-3 percentage points.</p>
Minnetonka Beach	<p>2022 Assessment Work Order Continues: Send letter requesting interior inspection or survey to all 225 Residential properties.</p> <p>2022 Assessment Status Update/2023 Assessment Work Order Work order for 2022 Assessment continues requiring complete review of all properties.</p>
Mound	2023 Assessment Work Order: Regressive PRB RES -3.4 Res. Send surveys to collect residential property data, review neighborhoods and site adjustments, review accuracy of current model and options/methods to improve performance of mass appraisal valuation in city.

Assessment Submission Data Expectations

The following data sets are requested from each city annually. All applicable spreadsheets must present final 1/2/2023 values and property attributes. These spreadsheets should include all parcels with identified property types. Each parcel listed should include all taxable and exempt subrecords. Parcels that have billboards, cell towers, hangers, railroad leases, etc. should be included in these spreadsheets. All spreadsheets should be submitted as a Microsoft Excel file. New EMV represents the 2023 estimated market value submitted.

Data requested annually is essential for county and state reporting as well as external data requests.

Please note: If requested assessment data is not provided within the requested timeframe, individual assessors and jurisdictions may be responsible for providing the relevant data directly to the source requesting the data.

Preliminary Commercial, Industrial and Apartment Assessment data must be submitted by January 3rd, 2022 for all jurisdictions. Assessors should submit all information by spreadsheet as described in this section. Jurisdictions under 30,000 should submit valuation information utilizing the spreadsheet provided by the county. Corresponding data elements described should be entered into Vision CAMA.

- Commercial / Industrial Spreadsheet
- Apartment Spreadsheet

Final Assessments and supporting data should be submitted by January 20, 2022 or according the published schedule for jurisdictions under 30,000 parcels. Jurisdictions using Hennepin County Vision CAMA to record their property information fulfill this requirement by keeping full and complete information within the system.

- 2023 Assessment Text File
- Residential Data Spreadsheet
- Exempt Data Reporting
- Quintile Reporting
- Staffing Information
 - Org Chart
- Assessment Narrative – Standard outline will be provided for 2022 Assessment
 - Identify Application of Split Trends and Corresponding Ratios
 - Explanation Sales vs. Property Type Growth
 - Explanation of Disparity Reduction Efforts
- City generated 10 Box statistics

Personal Property Assessment should be submitted by February 1, 2023

Assessor's may submit personal property assessment according to specifications below or submit values electronically on document provided by the assessor's office.

Agricultural Data Spreadsheet will be provided to assessors populated with updated 2023 assessment data as submitted by February 6, 2022. Assessor's should return with necessary updates by February 9th, 2023.

Details for these spreadsheets are listed on the following pages.

[Commercial & Industrial Spreadsheet](#)

Property Types: C / GC / I / LC / LI / NC / ND / NI / NP / SC / SM / SL / U

Include all taxable and exempt subrecords for applicable parcels.

Anticipated Submission Date: January 3, 2023

#	Data Element	Column Header	Data Type	Note
1	Parcel ID	PID	Text	<u>Numeric – No Dashes</u>
2	Subrecord #	SUBRECORD_NO	Numeric	
3	Project Name	PROJECT_NAME	Text	
4	Property Type	PROPERTY_TYPE	Text	
5	Use Code	USE_CD	Text	See CIA Usecode Guidebook
6	Contamination Code	CONTAMINATION	Text	A / B / C / D
7	Cell Tower / Billboard	CELL_BILL	Text	Cell or Bill
8	Zoning	ZONING	Text	
9	Usable Land Area	LAND_USABLE	Numeric	Square Feet
10	Gross Land Area	LAND_GROSS	Numeric	Square Feet
11	Land Value	VAL_LAND	Numeric	New EMV
12	Building Value	VAL_BLDG	Numeric	New EMV
13	Total Value	VAL_TOTAL	Numeric	New EMV
14	Improvement Amt	VAL_IMPROVE	Numeric	New EMV
15	Actual Year Built (AYB)	AYB	Year	
16	Effective Year Built (EYB)	EYB	Year	
17	First Floor Area (FFA)	FFA	Numeric	Square Feet
18	Total Floor Area (TFA)	TFA	Numeric	Square Feet
19	Gross Building Area (GBA)	GBA	Numeric	Square Feet
20	Net Rentable Area (NRA)	NRA	Numeric	Square Feet
21	Clear Heights	CLEAR_HT	Numeric	Feet
22	Mezzanine Area	MEZZ_AREA	Numeric	Square Feet
23	Basement Area	BASEMENT_AREA	Numeric	Square Feet
24	Office Area	OFFICE_AREA	Numeric	Square Feet
25	Car Wash Area	CAR_WASH	Numeric	Square Feet (Optional)
26	Hotel Unit Count	HOTEL_UNITS	Numeric	Hospitality Properties Only
27	Storage Unit Count	STORAGE_UNITS	Numeric	Mini Storage Properties Only
28	Market Class	MKT_CLASS	Text	
29	Tenancy	TENANCY	Text	Single / Two / Multi
30	Golf Course	GC	Text	
31	Primary PID in Chain	CHAIN_PRIMARY	Text	*
32	Series #	CHAIN_SERIES	Numeric	*
33	Sequence #	CHAIN_SEQ	Numeric	*

* **Series and Sequence (Preferred Class Chaining) Details** Primary PID is usually, but not required to be, the highest valued subrecord within a chain. For the upcoming Assessment, Series # will be 1 for all preferred class chains. Hennepin recommends the Sequence # is ordered by highest to lowest subrecord within each chain

[Apartment & Nursing Home Spreadsheet](#)

Property Types: A / HF / HL / HM / LA / MG / NH

Submission Date: January 3, 2023

#	Data Element	Column Header	Data Type	Note
1	Parcel ID	PID	Text	<u>Numeric – No Dashes</u>
2	Subrecord #	SUBRECORD_NO	Numeric	
3	Project Name	PROJECT_NAME	Text	
4	Property Type	PROPERTY_TYPE	Text	
5	Use Code	USE_CD	Text	See CIA Use Code Guidebook
6	Contamination Code	CONTAMINATION	Text	A / B / C / D
7	Zoning	ZONING	Text	
8	Usable Land Area	LAND_USABLE	Numeric	Square Feet
9	Gross Land Area	LAND_GROSS	Numeric	Square Feet
10	Land Value	VAL_LAND	Numeric	New EMV
11	Building Value	VAL_BLDG	Numeric	New EMV
12	Total Value	VAL_TOTAL	Numeric	New EMV
13	Improvement Amt	VAL_IMPROVE	Numeric	New EMV
14	Actual Year Built (AYB)	AYB	Year	
15	Effective Year Built (EYB)	EYB	Year	
16	Gross Building Area (GBA)	GBA	Numeric	Square Feet
17	Net Rentable Area (NRA)	NRA	Numeric	Square Feet
18	# Stories	STORIES	Numeric	
19	# Studios	UNITS_STUDIO	Numeric	Count
20	# 1 Beds	UNITS_1BD	Numeric	Count
21	# 1 Bed + Dens	UNITS_1BD_DEN	Numeric	Count (Optional)
22	# 2 Beds	UNITS_2BD	Numeric	Count
23	# 3 Beds	UNITS_3BD	Numeric	Count
24	# 4 Beds	UNITS_4BD	Numeric	Count
25	# Rentable Garages / Stalls	UNITS_GARAGES	Numeric	Count
26	# Nursing Home Beds	UNITS_NH	Numeric	Count
27	Market Class	MKT_CLASS	Text	

Residential Spreadsheet

Property Types: B / BJ / D / DB / DJ / FF / FN / HR/ HS / R / RL / RZ / S / TP / X / XC / Y

Hennepin County will submit required data on behalf of cities for Metro GIS, Hennepin County and other suburbanwide data requests

Anticipated Submission Date: January 20, 2023 in conjunction with final assessment submission

#	Data Element	Column Header	Data Type	Note
1	Parcel ID	PID	Text	<u>Numeric – No Dashes</u>
2	Subrecord #	SUBRECORD_NO	Numeric	
3	Property Type	PROPERTY_TYPE	Text	
4	Use Code	USE_CD	Text	If PT = B, BJ, D, DJ, HR, HS or S, then Required, otherwise Optional. See Following Page for List
5	Neighborhood	NBHD	Text	
6	District	DISTRICT	Text	Optional
7	<u>Lake/River Name</u>	LAKE	Text	Res On Water (Lake or <u>River</u>)
8	Style	STYLE	Text	See Following Page for HC Examples
9	# Living Units	LIVING_UNITS	Numeric	Count (Includes Mother-In-Law Units, Caretaker Houses, Second Houses, etc)
10	Co-Op Type	COOP	Text	Limited Equity / Market Rate
11	Actual Year Built (AYB)	AYB	Year	
12	Effective Year Built (EYB)	EYB	Year	
13	GLA	GLA	Numeric	Finished Above Grade Sq Ft
14	GBA	GBA	Numeric	Total Finished Sq Ft
15	FFA	FFA	Numeric	Finished First Floor Sq Ft
16	# Bathrooms	BATHS	Numeric	Count
17	# Bedrooms	BEDS	Numeric	Count
18	# Total Rooms	ROOMS	Numeric	Count
19	Basement Area	BSMT_AREA	Numeric	Square Feet
20	Basement Finish Percent	BSMT_FINISH	Numeric	Percent
21	Garage 1 Area	GARAGE_1_AREA	Numeric	Square Feet
22	Garage 1 Placement	GARAGE_1_LOC	Text	Att / Det / Tuck-Under
23	Garage 2 Area	GARAGE_2_AREA	Numeric	Square Feet
24	Garage 2 Placement	GARAGE_2_LOC	Text	Att / Det / Tuck-Under
25	Glazed Porch Area	PORCH_GLAZED	Numeric	Square Feet
26	Screened Porch Area	PORCH_SCREEN	Numeric	Square Feet
27	Open Porch Area	PORCH_OPEN	Numeric	Square Feet
28	Deck Area	DECK	Numeric	Square Feet
29	Patio Area	PATIO	Numeric	Square Feet
30	Central Air	CENTRAL_AC	Text	Yes / No
31	Heating Type	HEATING	Text	See Following Page for HC Examples

Discussion items: The county is currently reviewing process improvements to ensure data is correct and consistent data is reported through eCRV, PRISM and the DOR Sales and Sales Ratio reports with a goal of improving the accuracy of unmasking property types, identifying on water properties, and calculating wet trends. This goal of these discussions will be to identify the best way to ensure accurate reporting of DNR Lake Codes and Water Influence codes as reported in eCRV (1-lake, 2-River, 3-swamp, 4-other, 5-stream/creek or pond). As well as confirming river properties are included in Item # 8 above.

Residential Use Codes

Hennepin use codes are required to be provided with all parcels that have a property type of B, BJ, D, DJ, HR, HS or S. Optional for all other residential properties with the 2023 Assessment.

Code	Description	Typical Property Type
1010	Detached Single Family House	R / RL
1020	Duplex	DB
1030	Triplex	TP
1057	Zero Lot Line	RZ
1060	Outbuilding - Residential	RM
1070	Townhome	Y
1080	Condominium	X
1081	Condominium Operated as Apartment	X
1082	Condominium Conversion	AX
1085	Co-Op Limited Equity	XC
1086	Co-Op Market Rate	X
1088	Storage Condo	XM
1089	Condo Garage	XM
1330	Residential Vacant Potential Building Site	LL / LR
1350	Residential Vacant Unbuildable	LL / LR
1453	3-4-5 (Exempt) Wetland	LL / LR

Residential Data Elements

Jurisdictions maintaining their own CAMA systems are not required to use the same qualitative data descriptions, such as quality and condition as users of the Hennepin County CAMA system.

Residential Building Styles (Hennepin Examples)

Provided for reference. It is not required to use Hennepin Style codes.

#	Note
100	One Story
124	One and 1/4 Story Expansion
130	Split Entry
140	Split Level
150	One and 1/2 Story Expansion
175	One and 3/4 Story Expansion
200	Two Story
225	Two and 1/4 Story Expansion
230	Two Story Split Entry
240	Two Story Split Level
250	Two and 1/2 Story Expansion
300	Three Story

Residential Heat Types (Hennepin Examples)

Provided for reference. It is not required to use Hennepin Heat Type codes.

#	Note
01	Hot Water
02	Forced Air
03	Electric
04	Gravity
05	Other
06	High Efficiency Forced Air
07	Geothermal

Agricultural and Rural Vacant Land Properties

Property Types: BF / DF / F / FP / LF / LV / MF

Required by MN DOR for each combination of subrecord and state ag use code. Hennepin County will provide spreadsheet by February 6, 2023 using 2023 assessment data as submitted. Please provide updates and/or corrections by February 9, 2023.

Return with updates by February 9, 2023

Spreadsheets provided by Hennepin County will include the following data elements:

#	Data Element	Column Header	Data Type	Note
1	Parcel ID	PID	Text	<u>Numeric – No Dashes</u>
2	Subrecord #	SUBRECORD_NO	Numeric	
3	Property Type	PROPERTY_TYPE	Text	
4	State Class	STATE_CLASS	Text	1A / 2A / 2B / 4BB
5	State Ag Use Code	AG_USE_CD	Text	See Below
6	Conservation Program	CONSERVATION	Text	Yes / No
7	Green Acres	GREEN_ACRES	Text	Yes / No
8	Rural Preserve	RURAL_PRESERVE	Text	Yes / No
9	Building Value	VAL_BLDG	Numeric	
10	High (Deferred) Land Val	VAL_LAND_HIGH	Numeric	
11	Low (Program) Land Val	VAL_LAND_LOW	Numeric	
12	High (Deferred) Total Val	VAL_TOTAL_HIGH	Numeric	
13	Low (Deferred) Total Val	VAL_TOTAL_LOW	Numeric	
14	Usable Land Area	LAND_USABLE	Numeric	Square Feet
15	Gross Land Area	LAND_GROSS	Numeric	Square Feet

Agricultural Breakdown Codes

Code	Description	Typical Property Type
1400	Remaining Site – 2A	F/FP
1401	Remaining Site – 2B	LF/LV
1402	Remaining Site – 4BB	R
1410	Tillable – 2A	F/FP
1411	Tillable – 2B	LF/LV
1420	Wetland (Waste) – 2A	F/FP
1421	Wetland (Waste) – 2B	LF/LV
1422	Wetland (Waste) – 4BB	R
1430	Non-Productive Pasture (Meadow) – 2A	F/FP
1431	Non-Productive Pasture (Meadow) – 2B	LF/LV
1440	Woods – 2A	F/FP
1441	Woods – 2B	LF/LV
1450	Productive Pasture – 2A	F/FP
1451	Productive Pasture – 2B	LF/LV

Exempt Properties

Submission should include all parcels with a full or partial exemption. Please include all taxable and exempt subrecords for applicable parcels.

Submission Date: February 1, 2023

#	Data Element	Column Header	Data Type	Note
1	Parcel ID	PID	Text	<u>Numeric – No Dashes</u>
2	Subrecord #	SUBRECORD_NO	Numeric	
3	Owner Name	OWNER_NAME	Text	
4	Additional Owner Name	OWNER_NAME2	Text	
5	Exempt Use Code	EXEMPT_USE	Text	PINS Exempt Use Code
6	Land Val	VAL_LAND	Numeric	New EMV if Exempt
7	Bldg Val - Residence	VAL_BLDG_RES	Numeric	New EMV if Exempt
8	Bldg Val - Non-Residence	VAL_BLDG_NONRES	Numeric	New EMV if Exempt
9	Exempt Acreage	ACRES	Numeric	
10	# of Exempt Units	LIVING_UNITS	Numeric	Living Units (Either individual units or long term care rooms)

Quintile Reporting

Full Quintile Report for all active parcels within the city. Please include expected quintile information for the 2023 assessment and submit changes for upcoming assessment by May 28, 2023.

Anticipated Submission Date: January 20, 2023

#	Data Element	Column Header	Data Type	Note
1	Parcel ID	PID	Text	<u>Numeric – No Dashes</u>
2	Upcoming Quintile Year	NEXT_QUINITLE	Year	Next Assessment Year the Parcel will be in the Quintile
3	Last Inspection Date	INSPECT_DATE	Date	Last Quintile Visit Year / Month / Day
4	Appraiser	INSPECT_ID	Text	
5	Reason for Inspection	REASON	Text	Quintile / New Construction / Appeal / Etc
6	Result	RESULT	Text	Exterior / Interior / Left Tag / etc
7	Responsible Appraiser	APPRAISER	Text	Appraiser currently responsible for the PID
8	Appraiser Licensure Level	LICENSURE	Text	

Staffing Report

Submission Date: January 20, 2023

Please submit current staffing information if changes have occur after original submission by May 28, 2023.

Please submit an updated listing of all assessment staff (past and current) involved in the creation of the 2023 assessment along with current designations, list of duties and employment type (full time, part time or intern). Include any open positions. Please include an office organizational chart if available.

#	Data Element	Column Header	Data Type	Note
1	Jurisdiction/Employer	JURISDICTION	Text	Identify all Jurisdictions for each assessor/employee. Add Employer if not the same as Jurisdiction(s)
2	Name	NAME	Text	Assessor or Employee Name
3	Role	ROLE	Text	Role or Job Title
4	Current License Level	LICENSE	Text	CMA, AMA, CAMA-IQ, Temp IQ, Trainee
5	Employment Type	EMPLOYMENT TYPE	Text	FT, PT, Temp, Self, Contract
6	Start Date	START DATE	Date	Date of new employment or role change
7	End Date	END Date	Date	Date no longer contributing to assessment

Personal Property Spreadsheet

Property Types: All Personal Property Accounts

Assessor's have two options for submitting personal property assessments. Option 1. Assessors may submit personal property data in the following format. Option 2. Hennepin County will provide an electronic document with the data elements currently in PINS for the local assessor to submit.

Submission Date: February 1, 2023

#	Data Element	Column Header	Data Type	Note
1	Municipality Number	MUNIC	Text	
2	Account Number	ACCT #	Text	
3	Current/Noncurrent	C/NC	Text	C, NC
4	Parcel ID	PID	Text	
5	Copy of Lease	LEASE	Text	Y, N
6	Year Added	YR ADDED	Text	Year account became current
7	Year Terminated	YR TERMINATED	Text	Year account became non-current
8	Site Address	SITE ADDRESS	Text	
9	Taxpayer Name	NAME	Text	
10	Taxpayer Mailing Address	TAXPAYER ADDRESS	Text	
11	Item #	ITEM #	Numeric	
12	Leased from Govt Subdivision	LEASE GOVT	Text	T or Blank
13	Description	DESCRIPTION	Text	Cellular Antenna
14	Contiguous Indicator	CONTIG	Text	T or blank
15	Subrecord #	SUBRECORD_NO	Numeric	
16	Property Type	PROPERTY_TYPE	Text	New EMV
17	Land Value	VAL_LAND	Numeric	New EMV
18	Building Value	VAL_BLDG	Numeric	New EMV
19	Total Value	VAL_TOTAL	Numeric	New EMV
20	Improvement Amt	VAL_IMPROVE	Numeric	New EMV
21	Primary PP Account	CHAIN_PRIMARY	Text	
22	Series #	CHAIN_SERIES	Numeric	
23	Sequence #	CHAIN_SEQ	Numeric	

Key Contacts and Shared Mailboxes

Assessor's Office Management

Name	Email
Jim Atchison, County Assessor	James.Atchison@hennepin.us
Tamara Doolittle, Business Operations Assistant County Assessor	Tamara.Doolittle@hennepin.us
Josh Hoogland, Residential Assistant County Assessor	Joshua.Hoogland@hennepin.us
Ashley Gunderson, Commercial Assistant County Assessor	Ashley.Gunderson@hennepin.us
Leah Hart, Assessment Programs Manager	Leah.Hart@hennepin.us
Janene Hebert, Operations Manager	Janene.Hebert@hennepin.us

Shared Mailboxes

The County Assessor's office has several shared mailbox which should be used for correspondence.

Absolutely NO CONFIDENTIAL / PROTECTED DATA should be transmitted via email.

Shared Email Address	Description & Purpose	Example
Assessor.AO@hennepin.us	General public can email assessment related questions.	Taxpayer emails the question "How do I enroll in Green Acres."
AO.AnnualFiles@hennepin.us	Assessors should send all non-private / non-confidential initial assessment submittal files & documentation	Initial Assessment Roll of 2020 Assessment, Assessment Recap.
AO.Admin@hennepin.us	City and assessment staff should send <u>administrative correspondence with operations administrative team members</u>	<u>Permits, Quintile updates, Assessor Disclosure forms,</u>
AO.Programs@hennepin.us	Assessment staff should send correspondence related to the approval and processing of assessment program applications to assessment programs team	Correspondence on homestead or abatements, divisions, notification of files placed in the SFTP site.
AO.IEI@hennepin.us	Tax petitioners can communicate about the submittal of Income and Expense Info for Tax Petitions. Should NOT submit I&E through this account.	Request for a new account; notification of files placed in the SFTP site.
AO.DataRequests@hennepin.us	Assessors and the general public can submit requests for reports and assessment data.	Finance director wants a list of taxes paid for select parcels.

Gis.Info@hennepin.us	Assessors or general public can submit questions about any of the online mapping applications and open data.	Questions regarding lot size reported on public website.
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EXHIBIT A: QUINTILE PLAN FOR HENNEPIN COUNTY

Updates to the Quintile Plan were made with the 2021 Assessment. Updates included the following:

1. Define the requirements of an qualifying “in-office” review for quintile compliance
 - a. In-Office Inspection requirements include:
 - i. Review MLS records online in a view only capacity – Do not record or copy MLS data in the property record. Printing or maintaining copies of MLS data are licensing violations
 - ii. Using ortho, oblique and street view imagery. Google Imagery may be used in a view only capacity. Do not download or copy Google images. Printing, using Google images in documents, reports or manuals and maintaining copies of Google images are licensing violations
2. Allowing the use of property inspections that are not in the designated quintile inspections to be included as qualifying inspections for a jurisdictions quintile compliance report and meeting the requirements of viewing all parcels within a 5-year cycle.
3. Identification of permissible inspection types when those inspections are conducted with the same level of vigor as a typical quintile inspection.
 - a. Generally, includes all inspections for appeals or inspections in which an interior inspection is conducted

Hennepin County Quintile Plan

Minnesota Statutes require the assessor to view properties at maximum intervals of five years.

The purpose of this comprehensive quintile plan is to highlight the quintile requirements for your office.

As part of the quintile plan, staff will perform duties within the terms of this plan, as well as, state law, State Board of Assessors requirements, MN Department of Revenue and guidelines relating to appraisal industry standards. This plan is inclusive of all assessing districts/jurisdictions, assessors, and property types across the entire county of Hennepin.

The *minimum expectation* is that all parcels are **verified for proper classification** based on ownership and use of the property, all **tax programs are extended** to the owner/property and all **property attributes are correct**. It is also important to use the physical review and inspection process to check for **omitted or undervalued** property. Aerial photography and maps should be utilized to assist in identifying these properties.

Hennepin County's quintile plan will include at the jurisdiction level:

- The area of quintile (reported by PID); including exempt, vacant and multifamily residential properties
- Parcel counts – improved and unimproved, (by jurisdiction)
- Parcel classification, (i.e., R, C, A, LR, LC, X, Y)
- Identify staff doing each portion of the quintile and qualifications of staff
- Type of inspection that was completed, (i.e., interior, exterior, left tag)

The quintile plan should include plans to rectify items of concern identified by Hennepin County during the assessment approval process or other discussions, by the Property Tax Compliance Officer, or State Board of Appeal and Equalization.

Hennepin County will implement additional corrective, preventative, and detective controls and auditing processes throughout the year to ensure compliance.

1. Risk Report on areas of immediate concern for the upcoming assessment in addition to regularly scheduled quintile (Q1)
2. When assessor believes revaluation to be done, re-run Risk Report to allow time for finalizing completion of identified areas if any (Q3)
3. Certification of Quintile at time of assessment submission (Final Risk Report ran) and 5 year Updated Quintile Plan information.

Quintile Reporting Process

January	City Assessor submit proposed quintile plan and supporting documentation for upcoming quintile with the current year assessment submission
May	City Assessor provide updates or final quintile plan and supporting documentation. Changes due to State Board of Equalization appeals should be submitted within 2 weeks of the State Board orders
June	County Review Quintile Risk Report - Identify parcels not included in current quintile plan that will be out of compliance for upcoming assessment if not part of current year quintile
October	County to Review Quintile Compliance Report to ensure compliance to state requirements
February	County Reviews Final Quintile Report using inspection information provided with annual assessment submission

The following is an example of reporting by individual parcels:

	A	B	C	D	E	F	G	H	I
1	PID	Prop Ty	Quintile Year	Last Inspection Date	Appraiser	Appraisal Reason	Result	Status	
2	01-117-22-11-0003	A	2017	08/12/2016	BN	Quintile Review	Exterior	A	
3	01-117-22-11-0005	C	2018	11/15/2017	BN	Quintile Review	Exterior	A	
4	01-117-22-11-0006	C	2018	11/15/2017	BN	Quintile Review	Exterior	A	
5	01-117-22-11-0010	C	2018	11/15/2017	BN	Quintile Review	Exterior	A	
6	01-117-22-11-0011	C	2018	11/15/2017	BN	Quintile Review	Exterior	A	
7	01-117-22-11-0012	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
8	01-117-22-11-0013	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
9	01-117-22-11-0014	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
10	01-117-22-11-0015	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
11	01-117-22-11-0016	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
12	01-117-22-11-0017	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
13	01-117-22-11-0018	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
14	01-117-22-11-0019	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
15	01-117-22-11-0020	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
16	01-117-22-11-0021	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	
17	01-117-22-11-0022	X	2017	04/29/2016	MF	Quintile Review	Sent Card	A	

	A	B	C	D	E	F	G	H	I
1	PID	Display PID	Last Appraisal Date	Appraiser	Property Type	Reason	Result	Quintile Year	Exempt_Code
2	0111522110001	01-115-22-11-0001	09/24/2009	CDS	LR	Quintile Review	Exterior	2015	E
3	0111522110002	01-115-22-11-0002	09/24/2009	CDS	LR	Quintile Review	Exterior	2015	E
4	0111622110003	01-116-22-11-0003	07/11/2013	CDS	LR	Quintile Review	Exterior	2014	E
5	0111622110011	01-116-22-11-0011	09/12/2013	CDS	I	Appeal	Interior	2014	
6	0111622110012	01-116-22-11-0012	07/25/2013	CDS	C	Quintile Review	Interior	2014	
7	0111622110013	01-116-22-11-0013	07/25/2013	CDS	C	Quintile Review	Interior	2014	
8	0111622120007	01-116-22-12-0007	08/07/2013	CDS	I	Quintile Review	Interior	2014	
9	0111622120008	01-116-22-12-0008	09/09/2013	CDS	I	Quintile Review	Interior	2014	
10	0111622120011	01-116-22-12-0011	01/14/2014	SRS	C	Permit Review	Office Review	2014	
11	0111622130005	01-116-22-13-0005	07/30/2013	CDS	C	Quintile Review	Interior	2014	
12	0111622130011	01-116-22-13-0011	07/30/2013	CDS	I	Quintile Review	Exterior	2014	
13	0111622130012	01-116-22-13-0012	07/30/2013	CDS	LI	Quintile Review	Exterior	2014	
14	0111622130015	01-116-22-13-0015	07/30/2013	CDS	I	Quintile Review	Exterior	2014	
15	0111622130021	01-116-22-13-0021	08/06/2013	CDS	I	Quintile Review	Left Tag	2014	
16	0111622130022	01-116-22-13-0022	08/06/2013	CDS	I	Quintile Review	Interior	2014	
17	0111622130023	01-116-22-13-0023	08/06/2013	CDS	I	Quintile Review	Interior	2014	
18	0111622130026	01-116-22-13-0026	08/07/2013	CDS	LI	Quintile Review	Exterior	2014	
19	0111622130027	01-116-22-13-0027	09/09/2013	CDS	I	Quintile Review	Interior	2014	
20	0111622130029	01-116-22-13-0029	07/30/2013	CDS	C	Quintile Review	Left Tag	2014	

Please review Minnesota Statute 272.03, subdivision 1 as part of this plan.

Please note: The Code of Conduct and Ethics for Licensed Minnesota Assessors prohibits assessors from accepting appraisal assignments in which the assessor is related to the owner as a spouse, parent, or child, by blood or by marriage, or in which the assessor has a financial or other interest in the property. Each assessor must complete an Assessor Disclosure Form for each jurisdiction they assess. All conflicts must be noted and alternate assessors should be noted for those conflict properties.

Assessor Qualifications

All assessing offices within Hennepin County must utilize assessors that are properly licensed and qualified to review the parcels they are assigned. When interns are utilized for physical inspections, the final approval of any subjective changes suggested by the intern must be reviewed and approved by the certified assessor

assigned to the parcels. **Assessing jurisdictions must report to the county the license level of each staff member as part of the quintile report.**

Assessor Jurisdictions

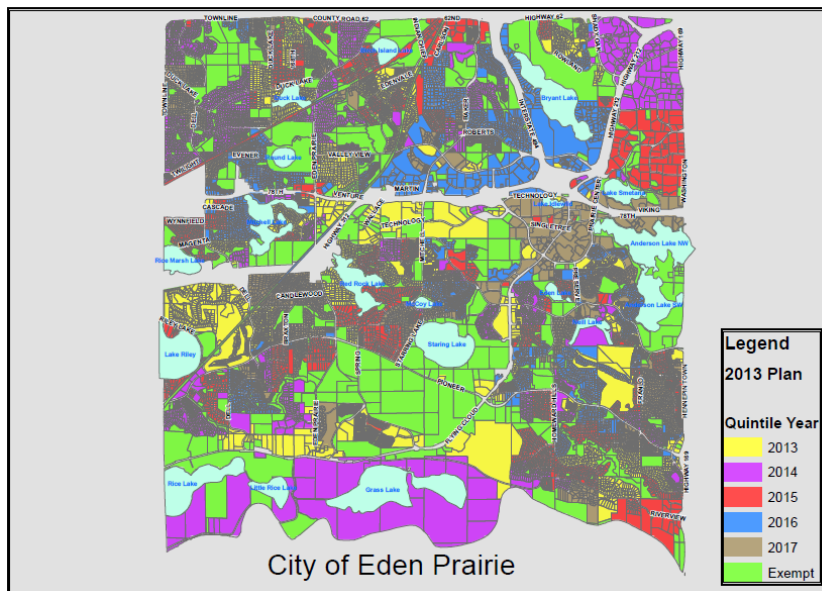
Quintile plans should be defined by geographic area such as section, quarter-quarter, or neighborhood. Hennepin County strongly recommends that quintile areas should include ALL parcels including vacant land and exempt parcels. The designated parcels in the quintile area are not required to include exactly 20% of the parcel count in a given year, however **no parcels should exceed a 5 year viewing cycle.**

Additionally, Hennepin County's quintile plan allows for flexibility for change to each city's plan to account for unexpected changes, such as legislative mandates to reclassify properties, or natural disasters that may take additional time for other reassessments. *If any of the city's plan needs to be altered because of staffing issues, legislative mandates, etc., it is Hennepin County's expectation that the quintile plan would be updated and resubmitted timely to the Hennepin County Assessor's Office for approval.*

As stated in Minnesota Statute 273.08:

"The assessor shall actually view, and determine the market value of each tract or lot of real property listed for taxation, including the value of all improvements and structures thereon, at maximum intervals of five years and shall enter the value opposite each description [emphasis added]."

Additionally, a GIS coded map showing color code by year as to what each city's plans are for current and future years.



Inspection Guidelines

Required items to carry when completing the (re)assessment are:

- **Employee badge/identification** should be worn or displayed prominently
- Assessor's license
- Business cards
- Any and all equipment needed to perform a complete inspection of the property

If you are denied entry, be clear about the process that takes place. If a property owner allows for conversation, first see if the owner is willing to describe the interior of the home. Will the owner recap the number of bedrooms, bathrooms, basement finish and other amenities? If not, advise the owner about any assumptions that you may be making. For example: If entry is not allowed and current records indicate that property is not completely finished, e.g., a house has a walkout basement with no basement finish and a typical level of finish for the neighborhood is about 50% including a bath, this may be the recommended estimate for the subject property. Always be respectful of the property owner's wishes and concerns.

Do not threaten and or exchange in a debate. An assessor/appraiser is to excuse themselves from the site and make a note in the file, if a refusal is indicated.

When the property owner is not present, leave a tag or other notice that you were at the property. Complete an external review and note any necessary changes. Take updated photos if needed. The information you leave behind should identify contact information so the property owner may call you to verify the information you have related to the property. **Do not peek into windows!**

No trespassing signs: Do not enter a property where a sign indicating no trespassing, keep out, or private is posted. The Hennepin County Assessor's policy is to contact the property owner to get permission to access the site. If there is no response received, use all available electronic tools to review and complete the appraisal process.

Any special or specific valuation adjustments should be reasonable, as well as consistently applied, and supported by clear documentation in the notes.

Using aerial photography to gather data, particularly for large properties, agricultural properties, and lakeshore, may be very helpful.

For all assessments, note the date and the type of inspection (external-only, interior, refused entry, left card, etc.).

Whenever possible and as a best practice, advanced notification should be provided to property owners before entering the property. This may be in the form of a letter or post card mailing.

Guidelines Desktop Quintile Reviews

Generate a list of PID's for our quintile area for your city from SSRS.

Here's general instruction on Desktop Quintile Reviews. (You may need to have your Assessor's Map, Sanborn, Nearmap, Cyclomedia, MLS, and Vision open at the same time):

1. Assessor's Map:

- a. Copy one of the PID's (with dashes) from the quintile list and paste it into your search box in the Assessor's Map.
- b. Click on the Layers tab and check the "site adjustment" box to make sure the site adjustment appears to be consistent within the neighborhood.
- c. Use the aerial imagery within Sanborn, Nearmap, and Pictometry to verify decks, porches, outbuildings, and any external obsolescence. Nearmap will provide the most up to date aerials for your review.
- d. Under the Tool tab, you can use it to verify sizes of different improvements.

2. Cyclomedia

- a. Appraisers should use Cyclomedia street view images as an assistance to identify any updates or quality and condition concerns of the property. Appraisers are permitted to-copy or download any Cyclomedia images or maps to internal files, include in reports, or share with external users.

Note: Appraisers may access Google maps and images in a VIEW ONLY capacity. They may view the data online, but no action should be taken to save, persist or incorporate the map or image in any work.

3. Vision:

- a. Copy the PIDs from the quintile list (without dashes) into the search box in Vision. (you can also query by neighborhood OR use the parcel selective tool and a text doc to upload the list of quintile PIDs into vision, this way you won't have to enter PIDs one by one)
- b. Review and verify information on the following screens:
 - i. Class and Land Screen (if an ag/rural vacant land parcel also review the tax use screen)
 - ii. Depreciation Screen (change to apex if you have an electronic sketch)
 1. If you have an electronic Sketch, fix any 1st floor areas that should be 2nd floors and associate the sketches
 2. Double check that the square footage comes from the sketch appropriately and coded as the correct subarea.
 - iii. Permits (see what permits have been pulled and make sure our effective age and characteristics reflect those improvements)
 1. Ensure that recent permits were captured correctly, or not missed.
 - iv. Construction Details (verify characteristics and equalize if necessary, with nearby sales)
 - v. Outbuildings and extra features (if there are any)
 - vi. Visit History Screen
 1. Contact: leave blank
 2. Appraiser: your #
 3. Inspection type: 11-in office review
 4. Appraisal Reason: 03-Quintile

5. Include any notes that you may need

4. MLS listing:

- a. Search in MLS if the property has sold recently (On your Henn Co Assessor map you can turn on your sales prices layer for the last 3 years.) and to check if our characteristics are correct. Just remember, listings often display the best components of the property.

Note: Utilization, sharing and printing of MLS documents or photographs are **strictly prohibited** by the MLS. Printouts from the MLS should not be copied or provided to other assessor's, city officials or taxpayers under any circumstances.

DO NOT make characteristics changes on sales to support an improved ratio. It's important to call it what it is so our building rates can be established correctly.

5. Send Property Owner a Letter

- a. If after your review of the property and review of neighborhood consistency (e.g. site adjustments, quality, condition and attributes in homogenous neighborhoods) you have outstanding questions, generate a letter to be mailed to the property owner.
- b. The letter template will be provided and will request a phone interview to answer outstanding questions.
 - i. Following the questionnaire for telephonic reviews
 - ii. Request photographs of any areas of concern for the property owner.

EXHIBIT B: FEE SCHEDULE (SUBJECT TO CHANGE FOR 2022)

General Assessment	Fee
ACE	\$500 - \$5,000 Annual/Per Subscription
APEX	\$120 Annual/Per Subscription
PIN's/VPN	\$50/Month for less than 3 login's
Original Annual Assessment Submission	No Charge
1 st Resubmission	No Charge
2 nd Resubmission (and beyond)	\$1,000 minimum per submission

Professional Services	Fee
Individual Systems Training	\$65/ per hour/per county staff member

Other Items	Fee
County Owned Devices	\$283 Month/Per device (County Computers)

APPENDIX C: MINNESOTA HISTORICAL SOCIETY RECORD RETENTION SUMMARY

Record Series Title	Record Series Description	Retention Period
Abatement Forms	Application for Reduction in Assessed Valuation of Personal Property. Name, Address, type of property, owner's value.	10 years
Accessing Charges	Units of Government which do not have their own assessor	6 years
Aerial Survey Prints	Prints of Hard aerial surveys showing details of various tracts of land	Destroy when superseded
Affidavit of Survivorship	Name, address and legal description	10 years
Agricultural Preserve Applications	Form putting agricultural land into the age preserve program. Also expiration of age preserve notices	3 years after expiration of application
Application for Disability (3CC Class) PE 3D	Name, address, signed by owners, social security number.	Retain while the classification or program application is in effect plus an additional 10 years
Application for Homestead Classification and Reduction of Taxable Value for Current Year	Name, address, social security number, sources of income, award letters	10 years
Application for Valuation and Tax Deferment of Agricultural Land Provided by Minnesota Agricultural Property Tax Law/Green Acre Applications	Applications and verifications of agricultural income for persons applying for Green Acre tax deferment	Retain while the classification or program application is in effect plus an additional 10 years
Application for valuation and tax deferment of Private Outdoor Recreational Open Space and Park Loans	Form used to list open space property	Retain while the classification or program application is in effect plus an additional 10 years
Appraisal Records	Field Card Total land and building values on front. Field card Land value appraisal record. Computation of same by grade and class. Building dimensions; sketches; computations. Specific data necessary to make value determinations	10 years
Appraisal Reports on Special Projects	Appraisals on Unusual or One time projects	6 years
Assessment Abstract Final	Total estimated Market Value and Total Assessed value by District.	10 years
Assessment Abstract Mini	Total Estimated market value by district	10 years
Assessment Books/Rolls	Total value, total land value, house and garage value and classification. One acre building value.	20 years, then transfer to the State Archives all years through 1901 and years ending in "0" and "1" thereafter. Archival Required.
Assessment Reports and Statistics	Summaries on various Classifications of Property and the assessments made thereon.	10 years
Assessors Manuals	Laws and Regulations on Assessing	Until Obsolete or superseded
Assignment of Contracts For Deed	Name and address of buyer and seller, legal description, terms	6 years
Blind Applications PE 3CC	Social Security number, name and address	10 years
Board of Review Files	Contains actions taken by local, county and state boards of review, attendance rosters, minutes, etc.	10 years; Transfer any minutes of the Review Board to the State Archives for selection and disposition. Archival Required.
Budget Office	Copy of monthly expenditures. Record copy in administrator's or auditor's office	1 year
Building Schedules	All buildings	4 years
Certifications of Value (State Forms)	Contains name and address of the buyer and seller; social security numbers; the sale price of the property; amount of personal property; amount of mortgage; terms of sale (in future); Valuation of the property.	5 years

Change of Address	Name and Address	1 year
Contracts for Deed	Name and address of buyer and seller, legal description, terms	6 years
Record Series Title	Record Series Description	Retention Period
Court Cases	Pending and settled court cases involving County Assessor, including all supporting documentation and exhibits.	10 years after settlement of case
Exempt Property Listing	Listing of all parcels and the latest exempt value.	10 years
Farm Rental Information	To determine value	6 years
Financial Statement	Determine value assistance	6 years
Fiscal Disparity Tables	Summation of Values by district Used by Auditor for computing mill rates.	1year
Homestead Applications ANNUAL	Applications for properties that require an annual homestead application such as agricultural homestead properties.	10 years
Homestead Information	Name, Address, Where they vote, Car License, Income Tax Filling	Retain while the homestead application is in effect plus an additional 10 years
Joint Tenancy Or Remainder man	Name, Address and legal description	6 years
Laws, Directives and Bulletins	Laws and rules covering assessor's offices directives and letters from Department of Revenue, Court Decisions, attorney opinions, etc.	Destroy when superseded
Maps Section/Half Section	Large maps (approximately 32"x36") in flat files used to identify and locate property for assessment, divisions, etc. Original in Countyveyor's Office, aerial photos, plats	Destroy when superseded
Midyear Homestead	Sworn statement as to homestead	6 years
Military Personnel	Sworn statement as to homestead.	6 years
Minutes State Board of Assessors	Minutes of meeting	1 year
Mobile Home Abstract	Valuation of mobile homes by district	10 years
Mobile Home Sheets and Field Cards	The listing of the mobile homes by individual owner, make and year of mobile home, size of mobile home, and computation of valuation	10 years
Mobile Home Statement	Description of mobile home taxes paid no delinquent taxes.	6 years
Mobile Home Valuation Guides	Used mobile homes average selling price (and cost new).	Until replaced by current edition.
Native Prairie Application (DNR Form)	Name, address, and legal description	10 years
Parcel Forms	Forms listing original parcels and new description for parcels divided. Shows values and legal descriptions being deleted and new ones being added	10 years
Personal Property Forms	Listing of personal property and their value and names and addresses.	6 years
Personal Property Return Owners of Residential Structures on Leased Public or Exempt Lands	Structures on leased public or exempt land are taxable	6 years
Plat Maps	Original in County Record's Office	Destroy when superseded
Probate Deeds	Name and address of buyer and seller, legal description, terms.	6 years
Property Owners List	Alphabetized list of name and address of all parcels owned by property owners	Destroy when superseded.
Property Tax Exemption Applications	Applications where a taxpayer is claiming exemption from property taxes	Retain while the exemption is in effect plus an additional 10 years

Appendix D: 2022 Assessment Priorities and Watch List Review

Jurisdiction(s)	Description
<p>All Hennepin County Jurisdictions</p>	<p>Disparity Reduction – Outstanding improvement in PRB’s and regressivity for the 2021 Assessment. This is an ongoing goal of the Hennepin County Assessor’s Office. An emphasis will be placed on statistical measures used to measure equity amongst and between segments of the market. Additional emphasis will be placed on PRB and improving equity in valuation of the lowest valued segments of the market.</p> <p>All jurisdictions will be required to describe efforts taken to meet disparity reduction goals.</p> <p>2022 Status Update: All Jurisdictions met the minimum expectation for the 2022 Assessment. Hennepin County leadership will work to improve understanding of the county’s disparity reduction goals throughout Hennepin County. The county will continue to work with all cities to improve comprehension and continue to make improvements in this area.</p>
	<p>2022 Work Order: Commercial, industrial and apartments land review. Complete review of land values for vacant and improved parcels to improve accuracy and equalization.</p> <p>2022 Status Update: Work order is complete. Jurisdictions should continue to review land values as a part of normal quintile and assessment completion work.</p>
	<p>2022 Work Order: Outdoor Storage Buildings. Review for correct property type, accurate and equalized values.</p> <p>2022 Status Update: Work order is complete. Jurisdictions should continue to review outdoor storage properties as a part of normal quintile and assessment completion work.</p>
	<p>2022 Assessment Watch: Commercial Assessments</p> <ul style="list-style-type: none"> • 2022 Assessment Watch: Countywide statistics indicate regressivity PRB (103.7) & PRD (-.7) • 2022 Status Update: Countywide regressivity statistics are within tolerances PRB (102.3) & PRD (-1.1) Resolved • 2022 Assessment Watch: County inferred property type median growth is low (87.6%) • 2022 Status Update/2023 Assessment Requirement: Countywide inferred property type ratio is acceptable (92.6%). Maple Grove, Minnetonka, Bloomington, Brooklyn Center, Mound, Hopkins & Richfield had inferred median ratios below 90%. • 2022 Assessment Watch: Property type growth is too low across the county as well is in most individual cities • 2022 Status Update/2023 Assessment Requirement: Property type growth has improved, some instances still exist where excessive sales growth and low inferred ratios indicate property type may be on the low side.

	<ul style="list-style-type: none"> • 2022 Assessment Watch: Sales growth regularly exceeds 150% of property type growth in many individual cities • 2022 Status Update/2023 Assessment Requirement: Sales growth exceeding 150% of property type growth Countywide. Sales growth exceeds 150% in aggregate and median parcel growth in the following cities: More than half of the cities that have commercial sales ratios. • 2022 Assessment Watch: These trends were seen in across all Hennepin County, Suburban Hennepin and most cities • 2022 Status Update/2023 Assessment Requirement: Improvements in the commercial assessment are recognized and appreciated. There are still some areas with room for improvement, the improvements made in many cities are commendable. <p>2022 Assessment Watch: Improvements expected in these areas. Explanations are required when statistical tolerances are exceeded.</p> <p>2022 Status Update/2023 Assessment Requirement: Significant improvements were made in regressivity, property type growth and acceptable inferred ratios in the 2023 Commercial Assessment. Countywide, particularly in several of the larger jurisdictions inferred ratios were low and sales growth was exceeding 150% of property type growth. Additional improvements are expected in these areas for 2023 Assessment.</p>
	<p>2022 Assessment Watch: Apartment Assessment</p> <ul style="list-style-type: none"> • 2022 Assessment Watch: Suburban Countywide statistics indicate excessive sales (9.5%) to property type growth (2.3%) • 2022 Status Update/2023 Assessment Requirement: Suburban countywide sales growth (11.5%) compared to property type growth (7.4%) was a significant improvement in closing the gap between sales growth and property type growth. Which just slightly exceeds the tolerance expected of no more than a 150% percent excess of property type to sales growth. We acknowledge part of the spread between sales vs property type change is due to the shifting of value due to legislative change reducing the 4D tier limit and will be watched for 2023. • 2022 Assessment Watch: Excessive sales growth is specific to certain cities • 2022 Status Update/2023 Assessment Requirement: Countywide the gap in property type to sales growth has increased past the 150% tolerance to 163%. 14 cities have sales growth that exceeds expected standards. Sales growth exceeds 150% in both aggregate and median parcel growth in the following cities: Minneapolis, Richfield, Spring Park, Brooklyn Park, Minnetonka, Edina, Maple Grove. We acknowledge part of the spread between sales vs property type change is due to the shifting of value due to legislative change reducing the 4D tier limit and will be watched for 2023. • 2022 Assessment Watch Suburban County statistics indicating regressivity are on the high end of the tolerance range PRD (102.2) and PRB (-.4) • 2022 Status Update: Countywide regressivity statistics are now within tolerances PRB (101.1) & PRD (-1.1). Resolved • 2022 Assessment Watch MCAP Sales Ratios are trending high at 97.5%

	<ul style="list-style-type: none"> • 2022 Status Update: MCAP Countywide sale ratio at 95.7%. Resolved • 2022 Assessment Watch COD is below tolerance levels at 1.9 • 2022 Status Update: COD is within tolerance levels at 6.1. Resolved. <p>2022 Assessment Watch Improvements expected in these areas. Explanations are required when statistical tolerances are exceeded.</p> <p>2022 Status Update/2023 Requirement: Significant improvements were made in regressivity, level of assessment and COD's and sales growth. Countywide, particularly in several of the larger jurisdictions inferred ratios were low and sales growth was exceeding 150% of property type growth when measured both in aggregate and according to the median parcel change. Additional improvements are expected in these areas.</p>
	<p>Watch: Equalize growth between sale and nonsale properties.</p> <p>Significant number of cities and markets exceeding 150% growth between sale and non-sale properties for the 2021 Assessment. Additional emphasis will be placed on ensuring sale and non-sale properties are changing similarly in value. Explanation required when growth of sale properties exceeds 150% of property type growth.</p> <p>2022 Status Update/2023 Requirement: Dramatic improvement was made in this area for Residential markets. Explanations will continue to be required as normal course of business when growth of sale properties exceeds 150% of property type growth.</p> <p>Industrial Countywide, and all Suburban County statistics exceeding 150% difference between property type growth and sale properties. Countywide, Big 7 & all Suburban median parcel sale growth is within excepted tolerance. Hennepin County All Contract cities joint statistics exceed tolerances in aggregate and median sale vs parcel growth statistics.</p>
	<p>Watch: Limited Equity Coop. Continue to review for consistency. Confirm limited equity status of Applewood Points. Carry over from 2021</p> <p>2022 Status Update/2023 Assessment Watch: Watch remains in place for 2023 due to ongoing court case.</p>
	<p>Watch: Wet/On Water Indicators. Continue review as part of ongoing assessment to ensure consistent application of on-water indicators/"wet" trends with an emphasis Lake Minnetonka area.</p> <p>2022 Status Update: Watch resolved.</p>
<p>Additional areas of work to be further defined for the 2022 Assessment</p>	<ul style="list-style-type: none"> • Group Homes – Defining living units - Complete • Common Elements – Progress was made in year 1 for 2022 Assessment continue work for 2023 Assessment • Personal Property Accounts - Continue work for 2023 Assessment • Exempt Assessment – Complete for 2022 Assessment. Work should continue to maintain and value exempt parcels similarly to taxable parcels throughout the assessment cycle. • PILT- Primary project HCRRRA complete -Continue for 2023 • Railroad -Continue for 2023 • UTA Parcels -Continue for 2023 • Value and classification of groups of individual PIDS where HBU is condo- Complete - for 2023 add review of single family/rentals/etc

<p>Hennepin County Assessor's Office Contract Jurisdictions & Local Contract Assessor's</p>	<p>2022 Assessment Order: Single Family Homes. Improve data quality for the interior of properties during quintile and new construction, especially for non-sale properties</p> <p>2022 Status Update/2023 Assessment Work Order: Work Order continues. Significant success was made should continue to be a goal for 2023 Assessment.</p>
	<p>2022 Assessment Order: Effective Age Review. Establish and implement guidelines and parameters to ensure consistent application of depreciation.</p> <p>2022 Status Update/2023 Assessment Work Order: Work Order continues for 2023 Assessment.</p>
	<p>Watch: All Residential/Residential Umbrella (Box 5) statistics frequently exceeding expected tolerances. The following trends were seen regularly in the Box 5 All Residential Statistics as well as in residential breakout's for R & RL property types (Boxes 6, 7, and 8):</p> <ul style="list-style-type: none"> • Sales growth regularly exceeding 150% of property type growth • Amount of property type growth was lower than expected resulting in inferred ratios below 94% • COD's below 4.0 <p>Overall, it appears too much emphasis on sales growth and changes, not enough growth on the universe of properties. Improvements expected in these areas. Additional explanations will be required for statistics falling outside of expected thresholds.</p> <p>2022 Status Update: Work order is resolved. Improvements were made in all areas. Jurisdictions should continue to strive to be within statistical tolerances. Explanations will be required as part of the assessment summary when statistics fall outside of expected thresholds.</p>
<p>Brooklyn Park</p>	<p>2022 Assessment Order: Complete review of all commercial properties. Finish inspection and review of industrial properties started in 2021. Review of properties should include the review and update of use codes and corresponding property types by 12/1/2021.</p> <p>Review of all 2a and 2b land in the city for consistency and correctness in both valuation and classification</p> <p>2022 Status Update: Work order resolved.</p>
<p>Excelsior</p>	<p>2022 Assessment Orders:</p> <ul style="list-style-type: none"> • All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision • Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification • Review site adjustments and consolidate neighborhoods as appropriate <p>2022 Assessment Order Review in process.</p>

Greenwood	<p>Watch: R & RL Review - History of large sales vs property type growth causing appearance of trying to catch up to the market. Analyze options of incorporating larger market area to drive assessment.</p> <p>2022 Status Update: Work order resolved. Continue goal of analyzing methods of incorporating larger market area to drive assessment.</p>
Long Lake	<p>2022 Assessment Orders:</p> <ul style="list-style-type: none"> • All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision • Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification • Review site adjustments and consolidate neighborhoods as appropriate <p>2022 Status Update: In process</p>
Maple Grove	<p>2022 Assessment Order: Review all apartments and medical office for 2022</p> <p>2022 Status Update: Work order resolved.</p>
Medina	<p>2022 Assessment Orders:</p> <ul style="list-style-type: none"> • All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision • Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification • Review site adjustments and consolidate neighborhoods as appropriate <p>2022 Status Update: In process</p>
Minnetonka Beach	<p>2022 Assessment Order: Send letter requesting interior inspection or survey to all 225 Residential properties.</p> <p>2022 Assessment Status Update: Work order for 2022 Assessment continues requiring complete review of all properties.</p>
Robbinsdale	<p>2022 Assessment Order: Review site adjustments and consolidate neighborhoods as appropriate around Twin Lake to improve equalization.</p> <p>2022 Status Update: Work order resolved.</p>
Rogers	<p>Watch: Regressive PRB All Residential/Residential Umbrella (Box 8) -3.3</p> <p>2022 Status Update: Work order resolved.</p>
Shorewood	<p>Watch: Regressive PRB /Residential Umbrella (Box 8) -3.5</p> <p>2022 Status Update: Work order resolved.</p>
Tonka Bay	<p>2022 Assessment Orders:</p> <ul style="list-style-type: none"> • All Commercial, Industrial and Apartment parcels should have a complete review and inspection. Property record should include APEX sketches, photos, and all property record details and data entered in Vision

	<ul style="list-style-type: none"> Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification Review site adjustments and consolidate neighborhoods as appropriate <p>2022 Status Update: In process</p>
Wayzata	<p>2022 Assessment Orders:</p> <ul style="list-style-type: none"> Review new developments, outlots, agricultural and other multisubrecord parcels for correct set up and classification Review site adjustments and consolidate neighborhoods as appropriate <p>2022 Status Update: In process</p>

Appendix E: 2021 Assessment Priorities and Watch List Reviewed

The following item(s) have been identified by the 2020 State Board of Equalization and are now complete.

Market/Jurisdiction	Description
Countywide	<p>The countywide ratios on RVL, mixed RVL/ag, and ag improved are all 117%. This is on a relatively small sample of 9 sales or less per PT. There are also indications in the small sample report of over valuation countywide. It appears RVL value increased significantly for 2020. There is a mix of land sold to developers and land sold to individuals for their personal use in the study. These are entirely different markets. Hennepin County should strive to improve uniformity for these property types and achieve acceptable assessment levels for the 2021 assessment.</p> <p>2021 Update: Expect to be at 99% Complete</p>
	<p>Rural Vacant Land (2b) – 44.4% Change from 2020 Assessment</p> <p>2021 Update: Expect was due to shifting and to be resolved</p> <p>2021 Update: Complete</p>

The following areas of improvement were noted by the County Assessor as potential issues with either classification, valuation or data consistency during the 2020 assessment review process. See comments below for completion status. Excellent progress was made in the areas of disparity reduction and regressivity.

Jurisdiction	Description
All Hennepin County Jurisdictions	<p>Disparity Reduction – An emphasis will be placed on statistical measures used to measure equity amongst and between segments of the market. Additional emphasis will be placed on PRB and improving equity in valuation of the lowest valued segments of the market. Improvements required for assessment approval on jurisdictions identified below.</p> <p>All jurisdictions will be required to describe efforts taken to meet disparity reduction goals.</p>

	<p>2021 Update- Outstanding improvement in PRB's and regressivity. This is an ongoing goal of the Hennepin County Assessor's Office.</p>
	<p>Additional emphasis will be placed on ensuring sale and non sale properties are changing similarly in value. Explanation required when growth of sale properties exceeds 150% of property type growth.</p> <p>2021 Update: Significant number of cities and markets exceeding 150%. Carry Forward with additional emphasis for 2022.</p>
	<p>Green Acres: Deferred value should change with the market</p> <p>2021 Update: High values implemented and now calced in Vision CAMA to ensure valuation changes consistent with market.</p>
	<p>Golf Course – Review bylaws to ensure compliance and proper classification.</p> <p>2021 Update: Review completed for those we had the most questions or concerns about.</p> <p>Review application of property types for consistency.</p> <p>2021 Update: Complete. Ashley/CIA team completed as part of the assessment completion.</p> <p>Ensure uniformity of low values across the County. Review taxable on course and club house values. Additional attention will be placed on high values and property types of the high valued subrecords. <i>Carryover from 2020 & 2019.</i></p> <p>2021 Update: Complete. CIA created a model to unsure values are applied consistently.</p>
	<p>Limited Equity Coop – Review for consistency</p> <p>2021 Update: Review all Limited Equity to ensure consistency countywide on all XC properties <i>Carryover 2021</i></p>
	<p>Office Data: Tenancy and market class definitions to be defined by September 2020.</p> <p>2021 Update: Definition was completed</p> <p>Tenancy & market class requested for office properties and market class requested for apartments to be submitted with the 2021 CIA Assessment spreadsheets. <i>Carryover 2020</i></p> <p>2021 Update: OPS Provide spreadsheet, Areas of inconsistency or missing data to be identified. <i>Carryover 2021</i></p>
	<p>Open Space: Review open space classification for consistency. <i>Carryover 2020</i></p> <p>2021 Update: Appraisers worked together to update HBU</p>

	<p>Use Code Updates: Please review and incorporate the following new use codes if not completed in 2020:</p> <ul style="list-style-type: none"> • 401 Industrial Equipment Storage/Service Garage • 393 Industrial Communications Facility • 710 Continuing Care Retirement Community <p><i>Carryover 2020</i></p> <p>2021 Update: Complete</p>
	<p>Wet/On Water Indicators - Identify criteria and applicable parcels to ensure consistent application of on-water indicators/"wet" trends with an emphasis Lake Minnetonka area. See proposed reporting changes.</p> <p>Review on water indicators Lake Minnetonka to ensure all on water properties included.</p> <p>2021 Update: Complete. Will continue to review as part of ongoing assessments. (Internal discussion & review requested to review how the implementation of lake indicators on condo, townhome, RZ properties would impact trends and reporting.)</p>
Brooklyn Center	<p>Residential Vertical Equity: Res PRB 5.5 Increase interior inspections. <i>Carryover from 2020 & 2019</i></p> <p>2021 Update: Complete PRB -2</p>
Brooklyn Park	<p>2021 Complete Revaluation Industrial Parcels – Inspections of all industrial properties including the review and update of use codes and corresponding property types by 12/1/2020. Complete revaluation of commercial parcels by 12/1/2021.</p> <p>2021 Update: ORDER for 2022 Assmt: Full Commercial review . Complete Industrial review from 2021</p>
Corcoran	<p>XM Storage Condo's - Ensure correct property attributes have been collected and review valuations for equalization and accuracy.</p> <p>2021 Update: Complete</p> <p>Land sales marked as improved sales. Review sales with Improvement amounts before calculating trends back to Jan 2019 by Sept. 2020</p> <p>2021 Update: Complete</p>
Crystal	<p>Residential PRB -4.3 Increase number of interior inspections</p> <p>2021 Update: Complete PRB -1.4</p>
Golden Valley	<p>2021 Res PRB -2.7 Increase interior inspections</p> <p>2021 Update: Complete PRB -1.2</p>
Greenfield & Independence	<p>Lake Sarah Review</p> <p>2021 Update: Complete</p>

Minnetonka	2021 Improve regressivity in lowest quintile of R - Libs Lake needs to be in Lake Minnetonka region 2021 Update: Complete
Minnetonka Beach	2021 Send letter requesting interior inspection to all 225 Residential properties <i>Carryover 2020</i> 2021 Update: Order requested due to assessment growth. Complete
New Hope	2021 Residential Vertical Equity: Regressive - Increase Res Interior Inspections 2021 Update: Complete PRB -.1
Richfield	2021 Residential Vertical Equity: -4.6%- Increase in interior inspection. <i>Carryover 2019</i> 2021 Update: Complete PRB -1.6
Robbinsdale	2021 Residential Vertical Equity: PRB - Increase in interior inspection <i>Carryover 2019</i> 2021 Update: Complete PRB -2.6
Spring Park	2021 Review & provide written description/explanation neighborhoods by 12/1/2020 2021 Update: Complete
Saint Anthony	2021 Residential Vertical Equity: PRB reduced to -6.2 - still too high. 9% properties had interior inspections. 81% in office. Need to increase number of interior inspections <i>Carryover 2019</i> 2021 Update: Complete PRB -2.7
Tonka Bay	Land sales marked as improved sales. Review sales with Improvement amounts before calculating trends back to Jan 2019 by Sept. 2020 2021 Update: Complete



4901 Manitou Road
 Tonka Bay MN 55331
 952-474-7994
 cityoftonkabay.net

MUNICIPAL DOCK RENTAL POLICY

This Municipal Dock Rental Policy is subject to change without notice.

1 **DEFINITIONS**

Applicant:

"Applicant" means a person who has filled out and submitted an application to rent a boat slip, slide or canoe rack from the City.

Boat Owner:

"Boat Owner" means the person renting a slip or slide named on the boat registration certificate issued by the DNR. Said registration certificate may not be registered to a corporation or business owner without written approval from the City Administrator.

Canoe Owner:

"Canoe Owner" means the person renting a canoe rack for their canoe or kayak. Canoe Owners are not required to provide proof of insurance.

Dock:

"Dock" means the municipal-owned docks with slips, slides or canoe rack located in the Dock Area.

Dock Area:

"Dock Area" means the area located within a line beginning at the southerly boundary of the channel abutting the North Channel Fire Lane, the point of beginning, then extending along the westerly and southerly right-of-way lines of Woodpecker Ridge Road, the easterly right-of-way line of Manitou Road, the northerly right-of-way line of Crabapple Lane and ending at the point of beginning.

Length of Boat:

"Length of Boat" means the horizontal measurement from tip of bow pulpit to end of swim platform or furthest point away from tip of bow, up to and including the motor in the up position, whichever is longer. Boat length cannot exceed the designated size limitations for the slip or slide. Size limitations will be designated by the City and may be amended from time to time. Boat length will be verified by City Staff if a boat comes into question.

Renter:

"Renter" means that person named on the boat registration certificate issued by the DNR and permitted by the City to store a watercraft at the Municipal Dock site. Said registration

certificate may not be registered to a corporation or business owner without written approval from the City Administrator.

Renter's Guest:

"Renter's Guest" is any person who is in the Dock Area at the invitation of a Renter.

Width of Boat:

"Width of Boat" means the horizontal measurement from the aftermost points of the starboard and port of the watercraft, including all equipment and attachments in their normal operation positions measured perpendicular to Length of Boat. Boat width cannot exceed nine (9) feet for any slip.

2 APPLICATION FOR SLIP RENTAL PERMIT

Subd. 1. Any person desiring to secure a permit shall apply to the City Administrator on the application form adopted by the City Council and amended from time to time.

Subd. 2. A slip assignment ~~and up to two (2) gate key cards~~ shall be issued provided:

- a. The application has been completed as required by the City Administrator.
- b. The applicant's boat meets the length and width requirements.
- c. The applicant is the owner of the boat for which the slip rental permit is requested.
- d. The applicant provides a copy of a valid watercraft license for the boat.
- e. For returning renters, the application, required documentation and payment of the rental fee is submitted to the City on or before the third Tuesday in February.
- f. For new renters offered a space, the space is accepted within five (5) days of the offer. The application and payment of the rental fee is submitted to the City within fourteen (14) days of the date the space was offered.
- g. The applicant submits proof of liability insurance for the boat. **Should this be a specified amount?**
- ~~h. The applicant has made a security deposit for the gate key card(s).~~

Subd. 3. The Renter shall report any change of status in their application in writing to the City Administrator within ten (10) days after such change has occurred. In the event said changes fail to meet the requirements for the issuance of a permit, said permit shall be reviewed by the City Council and subject to revocation. If requested, the Renter shall be granted a hearing upon at least ten

(10) days' notice before revocation is ordered. The notice shall state the time and place of the hearing and the nature of the failure to meet permit requirements. If the Renter does not report a confirmed change of status in their application to the City Administrator within 30 days, the City Council may revoke the permit without a hearing.

Subd. 4. Renter shall remove the boat from the premises within ten (10) days after permit revocation by the City Council. If Renter's boat is not removed within ten (10)

days, the City will remove the boat at Renter's expense. Renter shall remain obligated for all sums under this Municipal Dock Policy, and no refund shall be given until the Renter's designated slip is rented to another applicant.

Subd. 5. Permits issued under this Section shall authorize Renter to keep a specified watercraft at an assigned space for the specified boating season as provided.

3 PERMIT ALLOCATIONS AND APPLICATION DEADLINES FOR SLIP RENTALS

Subd. 1. Renewal notices for slip rental permits shall be emailed or mailed to current Renters by December 15. Applications, required documents, payment and security deposit shall be submitted to the City on or before the third Tuesday in February.

Subd. 2. Slip rental applications for new renters will be emailed as slips become available. Renters must respond within five (5) days of being offered a slip or forfeit the space. Payment will be due fourteen (14) days after the initial offer date.

Subd. 3. Permits shall be issued based upon the following priorities, with exceptions described in the Addendum:

- a. Tonka Bay residents with valid permits for the immediately preceding year.
- b. Residents of Tonka Bay on the waiting list subject to the following conditions:
 - i. Non-lakeshore residents
 - ii. Lakeshore residents
- c. Residents of Tonka Bay
- d. Non-residents of Tonka Bay currently renting a Municipal Dock Slip
- e. Non-residents of Tonka Bay on the waiting list
- f. Non-residents of Tonka Bay

4 APPLICATION FOR PERMIT FOR SLIDE OR CANOE RACK

Subd. 1. Permits for slides and canoe rack are done on a first come first serve basis, regardless of residency.

Subd. 2. Any person desiring to secure a permit shall apply to the City Administrator on the application form adopted by the City Council and amended from time to time.

Subd. 3. A slide or canoe rack assignment shall be issued provided:

- a. The application has been completed as required by the City Administrator.
- b. The applicant's boat or canoe meets the length and width requirements.
- c. Full payment has been received.
- d. The applicant is the owner of the boat or canoe for which the dock permit is requested.
- e. The applicant must provide proof of liability insurance if renting a slide. No

proof of insurance is required for renting a canoe rack.

Subd. 4. The Renter shall report any change of status in their application in writing to the City Administrator within ten (10) days after such change has occurred. In the event said changes fail to meet the requirements for the issuance of a permit, said permit shall be reviewed by the City Council and subject to revocation. If requested, the Renter shall be granted a hearing upon at least ten

(10) days' notice before revocation is ordered. The notice shall state the time and place of the hearing and the nature of the failure to meet permit requirements. If the Renter does not report a confirmed change of status in their application to the City Administrator within 30 days, the City Council may revoke the permit without a hearing.

Subd. 5. Renter shall remove the boat from the premises within ten (10) days after permit revocation by the City Council. If Renter's boat is not removed within ten (10) days, the City will remove the boat at Renter's expense. Renter shall remain obligated for all sums under this Municipal Dock Policy, and no refund shall be given until the Renter's designated slip is rented to another applicant.

Subd. 6. Permits issued under this Section shall authorize Renter to keep a specified watercraft at an assigned space for the specified boating season as provided.

5 PERMIT AUTHORIZATION – ASSIGNMENT NOT ALLOWED

Subd. 1. No permit shall be assignable. No boat, dock slip, slide or canoe/kayak rack for which a permit has been issued shall be rented or subleased.

6 START AND TERMINATION OF SEASON

Subd. 1. No slips, slides or racks shall be used for boat dockage until ice-out or May 1, whichever comes first. All boats or other watercraft shall be removed from the water and from the municipal dockage on or before November 1 of each year.

7 FEES

Subd. 1. The City Council shall set fees for municipal dock slips, slides and racks and the gate key fob security deposit. These fees will be reviewed annually and adjusted as necessary. Please refer to the fee schedule, Section 402 in the City Code. The City Council may also make a determination to suspend or reduce fees if such actions are merited.

Subd. 2. Upon return of the assigned gate key card(s), the security deposit will be refunded if returned by November 30. If November 30th falls on Friday, Saturday or Sunday, the deadline is the first Monday following November 30th.

8 PROHIBITED ACTIVITIES

- a. Swimming from the boat docks and in the dock area.
- b. Fishing from the boat docks and in the dock area.
- c. Creation of any housekeeping or sanitation problems, failure to use waste receptacles.
- d. Depositing of any refuse, sewage, debris, liquids or any polluting matter on the grounds or in the waters of the Dock Area. Non-compliance with any present and future state, federal and other governmental regulations regarding holding tanks and sewage disposal.
- e. Failure to deposit all garbage and other waste in bins and cans supplied for that purpose.
- f. Use of bicycles, scooters, roller skates, in-line skates and skateboards on the docks.
- g. Smoking on docks.
- h. Open fires of any kind (charcoal, propane, etc.) in any part of the Dock Area, including on boats. Fireworks within the Dock Area at any time.
- i. Cleaning of fish or disposal of fish parts within the Dock Area.
- j. Staying overnight on a boat docked in the Dock Area.
- k. Failure of renter to inform renter's family members and guests of all rules and regulations.
- l. Nailing, tying, or by any other means attaching objects or materials to the city docks for any purpose, except bumper material purchased from the city.
- m. Painting or scraping of boats or accessories.
- n. Disposing of oil, oil filters, paints, pain cans, cleaning fluid, batteries, or other hazardous and like materials in garbage containers.
- o. Boat lifts. For purposes of this paragraph, boat lifts shall include but shall not be limited to free-standing lifts and lifts attached to the city docks.
- p. Renter is responsible for compliance by Renter's guests with all provisions of these rules and all rules and regulations of the Dock Area.
- q. Allowing any part of the boat to protrude over any dock space, including but not limited to walkways.

9 WATERCRAFT OPERATION

- a. The craft shall be kept under control at all times when in the Dock Area.
- b. The craft shall be kept at all times under closed throttle when in the Dock Area- until boat has passed through the channel.
- c. Clearing propellers in the Dock Area is prohibited.

10 ADDITIONAL PROVISIONS

- a. Renter shall pay for any damages to city dock property.
- b. Renter shall hold the City of Tonka Bay and its employees harmless from and against any or all claims, suits, and damages which might ensue.
- c. The City makes no representation or guarantees concerning water level. Renter will make its own independent determination. Renter has a continuing

obligation to pay the total fee under this Municipal Dock Policy, notwithstanding the change in water levels that may affect navigability within the Dock Area.

- d. Renter agrees that all fees, charges, and other amounts owed to the City under this Municipal Dock Policy will be paid by the due date.
- e. ~~Renter forfeits the key fob security deposit if not returned to the City by November 1.~~

11 PUBLIC SAFETY WATERCRAFT

- a. Public safety watercraft shall be exempt from the permit allocation priorities.
- b. City Council may waive the fee for public safety watercraft.
- c. Public safety watercraft may exceed the length and width requirements.
- d. Public safety watercraft may use dolphin poles to secure watercraft.
- e. Public safety watercraft dockage shall be on a temporary basis by resolution and may be cancelled at any time by either party.

MUNICIPAL DOCK POLICY ADDENDUM

WAITING LIST FOR APPLICANTS

1. If there are not an adequate number of slips available to all applicants, a waiting list will be established. The waiting list will be in chronological order by the date applications are received and rank ordered by the priorities established in the Municipal Dock Policy.
2. Each applicant on the waiting list will receive a notice by mail when a slip becomes available. The applicant has fourteen days to notify the City if they intend to acquire a permit for the slip and pay all sums due.
3. An applicant may reject slips 1-3. If an applicant rejects said slips, the applicant will be placed on a secondary waiting list applicants, with priority given to whoever submitted their application to the City first.
4. If the waiting list becomes exhausted and slips are still available for rent, the City will alert Tonka Bay residents to the available slips by means determined by the City. All residents will be given the opportunity to acquire a slip on a first come, first served basis. If slips are still available after the procedure above is exhausted, the City may, at its discretion, offer available slips to non-residents.

DESIGNATED BOAT SIZE LIMITATIONS

1. Applicants shall not have a boat ~~registration~~ length greater than or equal to 27 feet under any circumstance unless it is a Public Safety watercraft.
2. Applicants cannot have a boat ~~registration~~ width greater than nine feet.
3. Boats are measured according to "Length of Boat" and "Width of Boat" measurement standards in the Municipal Dock Policy. Slip size limitations are below:

SLIP NUMBERS	LENGTH LIMIT	WIDTH LIMIT
#1 - #3	21'	9'
#4 - #77	27'	9'

(ADOPTED 04/26/11, REVISED 11/27/18, 02/26/19, 01/14/20)