

THE 73rd ANNUAL MAINE PROPERTY TAX SCHOOL

IS ONLINE!

Monday, August 3 - Thursday, August 19, 2020




COURSE DESCRIPTIONS




it's real. it's personal. it's online.

ONLINE COURSES

Courses marked with  indicate they are approved for advanced assessor training.

Week One


 **PT 201: Journey to Assessing Excellence (Monday, August 3 – all day).** Based on the Assessor's Maturity Curve model. Improve your office's climate and culture, gain key insights and practical strategies for creating healthy teams, and learn how to maximize your office's capacity and effectiveness. Instructor: David Cornell, MAI, CAE, Cornell Consultants, LLC. (7 CE hours - class limit: 40)

PT202: Teamwork (Tuesday, August 4 – all day). Come join us for a one day, participant driven workshop to learn the four core behaviors essential to every great team: self management, empathy, self awareness, and conflict management. This workshop is customized for assessing personnel and assessing offices. Instructors: David Cornell, MAI, CAE, Cornell Consultants, LLC; and Dr. Scott Young (7 CE hours - class limit: 40)

PT203: Basic Real Property Law (Wednesday, August 5 – morning). This workshop covers basic concepts in real property law. Those attending will have a basic knowledge and understanding of the classifications of title, title transfer methods, type of deeds, recording statutes, security of title, and easements. Instructor: Knud Hermansen, consultant and retired University of Maine professor. (3.5 CE hours)


PT204: Property Descriptions (Wednesday, August 5 – afternoon). This workshop will explain descriptions

and provide the skills and tools for the understanding and analysis of property descriptions. Particular attention will be given to detecting problems with descriptions, analyzing access to the property, and determining the quality of descriptions and surveying services. Instructor: Knud Hermansen, consultant and retired University of Maine professor. (3.5 CE hours)

 **PT205: Assessor Ethics (Thursday, August 6 – morning).** Like all professionals, assessors have ethical issues. Ethical issues arise when the law is unclear or when two “right ways to act” come into conflict. This class will sketch the legal framework within which ethical issues arise and consider how assessors can address issues of potentially conflicting loyalties, appearance of impropriety, disclosure and withdrawal. Instructor: N. Joel Moser, shareholder, Bernstein Shur. (3.5 CE hours)


PT206: Reasonable Minds May Differ: Legal Standards of Review and Property Tax Exemptions (Thursday, August 6 – afternoon). Have you ever wondered how much the Maine Supreme Court relies on the decisions of Superior Court when those decisions are appealed? There are legal guidelines in these situations, called standards of review. This class explores the official standards of review as they apply to property tax exemption cases. Instructor: N. Joel Moser, shareholder, Bernstein Shur. (3.5 CE hours)

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Weeks Two and Three

PT105: The Assessor's Practice (Monday, August 10 – all day) This comprehensive course is designed for new assessors, board of assessors members, and people aspiring to become assessors, but is full of practical information that anyone in the profession may find useful and relevant. This class will cover the actual day-to-day administration of an assessing office, as taught by seasoned assessors. Topics covered will include field inspections, deeds processing, mapping, personal property procedures (including the Business Equipment Tax Reimbursement and Business Equipment Tax Exemption programs), record retention and filling out the Municipal Valuation Return, exemptions, current use programs, using assessing software systems, abatements and appeals, and anything else students want to know. Instructors: Judy Mathiau, CMA, Winslow assessor; and Kerry Leichtman, CMA, Rockport/Camden assessor. (7 CE hours)

 **PT207: 7-Hour National Uniform Standards of Professional Appraisal Practice (USPAP) Course (Tuesday and Wednesday mornings, August 11 & 12).** As developed by The Appraisal Foundation, this course focuses on changes to USPAP for 2020-21 and on appraisal issues that affect daily appraisal practice. It is unique in that the course is developed by The Appraisal Foundation and is revised on a periodic basis to stay current with the latest edition of USPAP. In addition to the student manual, each student must have a copy of the 2020-21 USPAP Combo Package, which can be

ordered through the Appraisal Institute website at: <https://appraisalfoundation.org/imis/itemDetail?iProductCode=407&Category=PUB>. Instructor: David Sawyer, CMA, Certified Instructor. (7 CE hours)

PT208: Certified Assessor Potpourri ("CAP") Talk (Tuesday, August 11 – afternoon). A panel of Maine assessors will share their insights in 10-15 minute segments in this CAP Talk format on a variety of assessing related topics. This fun, fast-paced presentation was well-received in prior years and is guaranteed to increase your assessing knowledge! Moderator: Jim Thomas, CMA, South Portland/Westbrook assessor. (3.5 CE hours)

 **PT209: Basic Construction Refresher (Tuesday and Wednesday mornings, August 18 & 19).** The Basic Construction Refresher course is designed for real estate agents and appraisers to review fundamental construction methods, both old and new, in residential real estate. The course covers construction from site preparation through completion. Major components of a house are identified including building materials and mechanical systems. Further, the course reveals 'red flags' that are discernible to agents and appraisers when inspecting a home for a listing, sale, or valuation. Finally, the course describes how physical and functional issues in houses affect value. Instructor: David Sawyer, CMA, Certified Instructor. (7 CE hours)

CERTIFICATION EXAMINATION

The Certified Maine Assessor (CMA) exam is an eight-hour test that begins promptly at 8:00 am and ends promptly at 5:00 pm, with a lunch break from 12:00 – 1:00. The August exam will be conducted in Augusta.

Only pencils and calculators will be permitted in the testing room. Pencils, rather than pens, are required because the answers to Parts II – V are recorded on a fill-the-bubble answer sheet. Calculators should have standard functions, including a square root key. Proctors may inspect calculators at any time. **CELL PHONE CALCULATORS ARE NOT ALLOWED.**

Part I of the exam is passed out first and must be completed before receiving Parts II – V. As a general rule, Part I of the exam requires a correct answer of one or two short sentences for 25 mostly multiple-part questions that test the candidate's practical knowledge and ability to find answers to questions relating to property tax law. The test packet for this part includes both volumes of Laws Relating to Property Taxation and a copy of all Property Tax Division bulletins. Part I of the exam has a four hour time limit. Part I and the test packet must be returned to the proctor by 12:00. Parts II – V are passed out all at once at 1:00 or when Part I is finished, if before 12:00. Each of these parts contains 50 multiple choice questions that deal with general information and problem solving. A minimum score of 70% on each part is required in order to pass the CMA exam. For more detailed information about the CMA exam, see Property Tax Bulletin No. 22 and MRS Rule 205 at: *www.maine.gov/revenue/propertytax*.

INTRODUCTORY COURSES/CMA EXAM

Textbooks and additional study material for PT101, PT102, PT103, and PT104 are available on the Property Tax Division website at *www.maine.gov/revenue/propertytax*. The Property Tax Division will hold the exam in person, physical distancing observed, on Thursday, August 27, in Augusta.

CONFIRMATION

As soon as your registration has been received and processed, we will send a confirmation email. If there is a problem with your registration, we will contact you as soon as possible. Please include a phone number with your registration, in case we need to call you.

Closer to the start of the online courses, we will send you an email with links to the presentations. Please mute your microphones prior to joining a course.