



The mission of the Ad Valorem Division of the Oklahoma Tax Commission is to promote an ad valorem property tax system which is fair and equitable to all taxpayers by implementing standard valuation methodology, tax law conformity, and assessment administration compliance.

“IAAO Zangerle Award Winner:  
1997 and 2010”



# Oklahoma Ad Valorem FORUM

## Director’s Notes:

It’s hard to believe the historic 75th Annual “Diamond Anniversary Edition” of the Tax Commission Educational Conference for Assessing Officers is over, and in the history book. We really enjoy seeing everyone at the Conference each year, and it’s always gratifying to see such large attendance numbers.

Between bingo and the special banquet to celebrate our 75-year milestone, along with all the other exciting activities out on the town during the week, our group managed to squeeze in plenty of good social activities in addition to attending the Conference sessions.

The Conference is a great time for each of you to network with your peers, share common concerns, ask questions, and gain knowledge. It helps us come to recognize that we are in this ad valorem world together, and that other people can relate to our challenges, problems, struggles and triumphs as we go about our difficult work.

As with every Conference, many things went really well, and a few others did not. Each year after the Conference, we spend a great deal of time reviewing Conference evaluation sheets to learn what worked and what did not. Additionally, we always appreciate the recommendations that we receive for future Conference topics. Much of what you see on the agenda each year is a direct result of these comments and suggestions.

A conference of this magnitude would not be possible without a host of dedicated and generous people working hard to make it happen. In addition to all of my coworkers at the Ad Valorem Division, I want to personally express my sincere gratitude and appreciation to all of our partners involved.

I am grateful to our State Board of Equalization members for their participation in our opening session, and for their comments. Lt. Governor Matt Pinnell and State Auditor and Inspector Cindy Byrd each did a great job. It was also good to have Tax Commission Chairman Charlie Prater, and Amy Rasmussen, RES, AAS, the IAAO President-Elect with us at the Conference. Amy shared her perspective on the importance of education and professionalism in the assessment world. We were also honored this year to have our long-time friend and colleague Jewette Farley, CAE back with us to celebrate the 75th anniversary of the Conference. And I offer my thanks to Paul Hardy, CPA, President of OATR, for attending the opening session and for his comments to the group as well.

It was also fun to have two former Ad Valorem Division Directors in attendance at our Wednesday evening banquet—Phillip Scott, RES, and Jeff Spelman, CAE. They have been friends and mentors of mine for several decades now, going back to 1985 when I started at Oklahoma County as a field deputy.

I appreciate each of the Assessor’s Association officers and all they do to help us. Donise Rogers, Guyla Hart, Lisa Melchior, and Matt Wehmuller have been working hard all year for your Association, and we really enjoy coordinating with them as they handle a long list of tasks on your behalf.

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Our Conference Instructors always provide outstanding information in an interesting and professional way, and this year was no exception. Thanks to Gary Snyder, RES, for the significant contributions of his staff members at CLGT— In addition to our national instructors, our friends and colleagues at CLGT are our most significant partner in providing the education and training you receive each year at Conference, and we’re grateful for their continued assistance and participation. Our thanks to Eric Hayes, RES; Karen Tadych, Cody Kennedy, and the CCAP group which includes Scott Warren, Carol Bomhoff and Michael Challis for their efforts.

We also appreciate Jerry Wisdom, PPS providing materials for the Oil and Gas Equipment Identification session at Conference this year. Other instructors deserving of a special thanks include Dana and Phillip Buchanan and Suzanne Grooms. Thanks also to our panelists and the OTC Motor Vehicle Division for their help with the manufactured homes session Thursday afternoon: Betsy Hilton, Tulsa County; Karen Smith, Cleveland County; Tiffany Lester and Kim Miller, representing the Motor Vehicle Division.

Sandy Hodges did a great job with her session entitled “So Now I’m an Assessor—What do I do Next?” Thanks to our deeds session speakers, Fred Sordahl of Mayes County Abstract Company, and Eva Kelley with American Eagle Title. We are also grateful for the assistance of Lisa Hobart, CAE, PPS, ASA for the outstanding appraisal topics during the week. And we need to recognize Kyla Bendt for the MIMS mapping software training.

Thanks to Mandy Snyder and John Wright for their participation in the “Legislative Update” session, and their willingness to share information and knowledge with us.

Landmark GSI also provided significant instruction and training, as well as an overview of their CAMA software, so we extend our thanks to Todd Holliday, Taylor Holliday, and Randi Buchanan for their efforts during the Conference.

My sincere apologies if I have missed recognizing anyone for their efforts. It is a huge project to provide the educational materials presented at Conference, and we are very fortunate to have so many wonderful people assist us each year!

Finally, I’m appreciative of the significant efforts of our AdValorem Division staff members for their help in serving as instructors, course monitors, and hosts for the week. We couldn’t put on the Conference without them, and it is a privilege to work with each of them.

And we extend our congratulations to the 90 assessors and deputies who completed either their initial or advanced accreditation requirements. A total of 64 walked the stage at the Conference to receive their certificates. That’s a great achievement. Under the statute, CLGT conducts the education and preparation of the courses, and we get the honor of jointly presenting certificates to our newly accredited assessment professionals at the Educational Conference.

Kind Regards,  
Joe Hapgood, CAE  
Ad Valorem Division Director

*P.S. - “Everything will be OK in the end... If it’s not OK, it’s not the end!”*

## Ad Valorem Forum Mailing List:

If you would enjoy receiving this monthly publication, please send your email address to [mandy.wilkerson@tax.ok.gov](mailto:mandy.wilkerson@tax.ok.gov).

If you have coworkers who would enjoy receiving this monthly publication, please send their email address to [mandy.wilkerson@tax.ok.gov](mailto:mandy.wilkerson@tax.ok.gov).





## “A Mapping Minute”

With Steve Oliver

Well, another Conference over with, and wasn't that dinner wonderful. Overall, from everything I have heard about our 75th Session, it was a success. (I hear Bryan's Medical Marijuana class had a very High attendance.)

Once again, I was able to bring back the OKMAP's crew. Shelly and Charles are always a good addition to the conference, and it was exciting to see the new things they have added to the OKMAP's system. It was also nice to have Jeff and David from the OU Center for Spatial Analysis on hand this year. They were able to show attendees what services they have, and gave everyone a small history lesson on how everything merged together. I thought I had an understanding of the history, but I feel much better educated after their class. Finally, once again, it was great to have Kyla, from the Computer Mapping Company aka MIMS. Her all day session demonstrating their software was exciting.

With the 75th “Diamond Anniversary Edition” in the books, it's time to start thinking about next year's conference. I would like to spend the rest of 2019 gathering feedback from you, and finding out what you would like to see concerning mapping next year. What challenges do you have with mapping? What important updates do you need? Maybe you'd like to learn some strategies for drawing a subdivision, or talk about those “pesky” government lots? Perhaps you need some tools to help determine land use? The educational conference is for you; we want to make it as educational, and fun, for you as possible, but we can't do that without your input. So, I look forward to hearing from you on the subject over the next few months.

Finally, as of June 30th, I was no longer allowed to assist you with computer mapping software. Recently, an arrangement was made to allow me to assist you with mapping, for the time being. My primary job has always been updating municipality boundaries, but mapping support has always taken most of my time. If you thumbed through my books at the conference, you could see that most of my time was not being spent updating maps. Since July 1st, most of my energy has been focused on municipal boundaries, and my new commitment working with the Census Bureau is going to monopolize my time. I should nearly always be available to take your phone calls, and if a county visit is necessary, I will do my best to arrange one. If your issue is preventing you from being able to do your mapping, I will bend over backwards to get to you.

Until next time, keep up the good work.

## “Let's Get Personal” Property

by Patty Heath

This year's Annual Conference was a success. There was positive feedback from all the Personal Property Tracks this year. Everyone seemed to enjoy and get a lot of education from the class for personal property and five-year exemption that Bryan Shuck taught.

Bryan's class on “Personal Property Goes to Pot” was a huge success. If you have any questions regarding the marijuana classifications for equipment, please let Bryan know.

The scheduling for the 5-Year Exempt Manufacturing inspections for September and October are almost all confirmed. I will contact each county to inform them when I will be in their county, and offer an invitation to accompany them on the inspection. The county is not obligated to go, but it may serve as a good “P.R.” visit to the site.

The Personal Property Schedule Public Hearing is scheduled for 10:00 a.m. on September 19, 2019 at the ACCO Building in Oklahoma City. All are welcome.





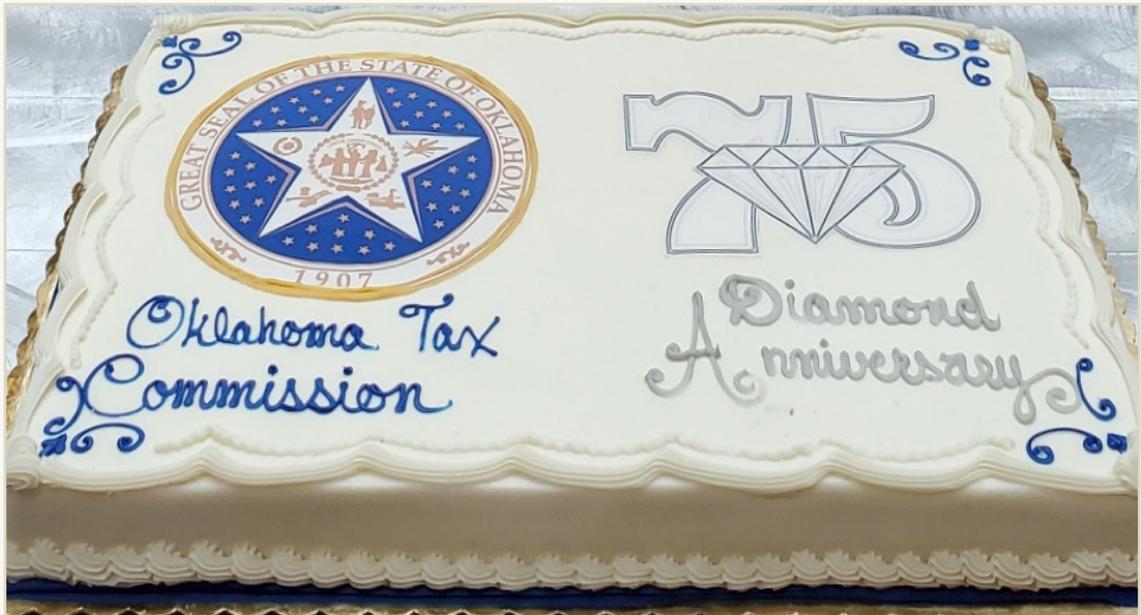
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## 75th Annual Educational Conference

### *Diamond Anniversary Edition*

*Moving Through Changing Times  
in Assessment*



*Oklahoma Tax Commission  
Chairman Charles Prater  
at opening session.*



*Ad Valorem Director  
Joe Haggood, CAE.*





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## 75th Annual Educational Conference

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*Ad Valorem Deputy Director Doug Brydon  
before the banquet.*



*Lt. Gov. Matt Pinnell  
speaking at opening session.*



*Special guest speaker  
Jewette Farley, CAE, RES, CLA.*



*IAAO President Elect  
Amy Rasmussen, RES, AAS*





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## 75th Annual Educational Conference



*Lisa Hobart, CAE, PPS, ASA instructor  
and guest speaker*



*Director of the Center for Local  
Government Technology,  
Gary Snyder*



*Past Ad Valorem Director  
Phillip Scott, RES*



*Past Ad Valorem Director  
Jeff Spelman, CAE*



*State Auditor Cindy Byrd, CPA  
at opening session*

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## 75th Annual Educational Conference



*Opening session audience.*

### *Awards Banquet Pictures*



**Oklahoma Tax Commission  
2019**

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## 75th Annual Educational Conference

### *Awards Banquet Pictures*



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## 75th Annual Educational Conference

### *Awards Banquet Pictures*



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**IAAO**  
**Oklahoma Chapter**  
**"George Keyes"**  
**Award Nomination Form**



Email submissions to Dana Buchanan at dbuchanan@scaook.com or fax to (580) 252-8584.

You may also submit a copy via US Mail to:

IAAO Oklahoma Chapter, Dana Buchanan - Awards Committee  
101 S. 11th Street, Room 210 Duncan, OK 73533

Nominations must arrive by September 20, 2019 to be accepted.

Winner will be announced during the annual County Assessors' Association Fall Conference

**Eligibility** - Nominee must be an active member who is in good standing with the IAAO Oklahoma Chapter. Additionally, a nomination may only be submitted by an active member who is in good standing with the IAAO Chapter. Members of the Nomination Committee are not permitted to be nominated or to nominate a possible recipient for the award.

**Nomination Guidelines:** This award is presented to the IAAO Oklahoma Chapter member who has made a significant contribution to the association through active participation in its activities. Items of interest may include but are not limited to: participation in IAAO conferences, courses, workshops and seminars as well as other areas of interest within the local chapter.

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*(Nomination must come from a member of the IAAO Oklahoma Chapter in good standing for consideration)*

**Nominated By:** \_\_\_\_\_  
(Print name) (Signature)

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Employer: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**Liability Disclaimer:**

The IAAO Oklahoma Chapter has made no independent verification of the accuracy and/or completeness of the information submitted. All information received is considered reliable, true, and correct. The IAAO Oklahoma Chapter does not warrant or assure liability or responsibility for the accuracy, veracity, completeness, or usefulness of any of the supplied or published information. In addition, the IAAO Oklahoma Chapter makes no warranties, expressed or implied, with regard to any of the reported practices. All decisions of the IAAO Nomination Committee are final and without recourse. Upon acceptance of this award, the person(s)/group/entity grant permission to use their name/entity/profession/photo(s) in any IAAO or IAAO Local Chapter publication or website.

**Nominee's Name & Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Employer:** \_\_\_\_\_

**Employer's Address:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

Below, summarize the reasons you believe this nominee is deserving of the "George Keyes" award. Describe how he/she has contributed to the realization of the mission of IAAO and reinforcement of those practices through the IAAO Oklahoma Chapter. Provide information that demonstrates excellence in the performance of tasks associated with the individual's or team's work or project. In addition, show how this work has had a positive impact upon either the work environment or the quality of service to others. In general, provide any details of which you feel this person/group/entity is deserving of this award. All descriptions will be honored & reviewed. Attach additional documents/information if necessary.

# IAAO Course 500 - Assessment of Personal Property

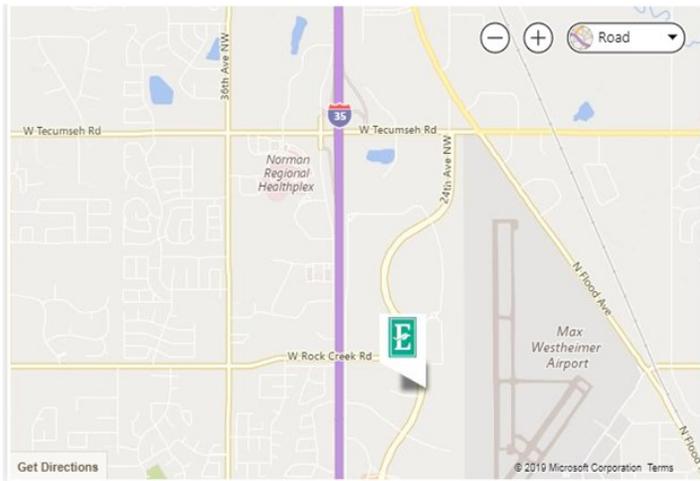
December 9 - 13, 2019, Embassy Suites Hotel and Conference Center Norman, OK

## Sponsored By:

Embassy Suites Hotel &  
Conference Center  
2501 Conference Drive  
Norman, OK 73069  
405-253-3547



INTERNATIONAL ASSOCIATION  
of ASSESSING OFFICERS  
*Oklahoma Chapter*



**Course 500—** This course is designed to provide students with an understanding and working knowledge of the procedures and techniques required to assess personal property. This course concentrates on the skills necessary for listing, appraising and assessing the market value of properties using the three approaches to value: the cost approach, income approach and sales comparison approach. This course offers a broad mixture of theory and practical application. For more information about this course, please go to the [IAAO website](#).



Instructor : Lisa Hobart CAE, PPS, ASA

**Contact Information:** Brian Fife, Canadian County Chief Deputy

Email: [fifeb@canadiancounty.org](mailto:fifeb@canadiancounty.org)

Phone: 405-295-6117

**REGISTRATION AND PAYMENT IS REQUIRED BY NOVEMBER 13, 2019**

# IAAO

## Course 500

# Assessment of Personal Property



INTERNATIONAL ASSOCIATION  
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**(30 hours CE)**

**Instructor:**

Lisa A. Hobart CAE, PPS, ASA

**Location and Hotel Rooms:**

Embassy Suites Hotel and Conference Center  
2501 Conference Drive  
Norman, OK 73069  
Direct Phone: 405-364-8040

**Rates:** \$94 + tax per night for single or double occupancy, breakfast included.  
(*block rooms reserved*).

Online booking for our group, [click here](#) or call 1-866-577-1273 using the group code 'IAA'. Book by November 17, 2019 for group rate. Any unsold rooms at that time will release back into regular inventory.

**Cost:**

Course 500 registration fee is \$450 for chapter members or \$525 for non-chapter members and includes a student reference manual.

**Registration:**

To enroll, complete an individual registration form **for each person attending**, and mail payment with form(s)

to : Canadian County Assessor's Office  
Brian Fife, Chief Deputy  
200 N Choctaw Ave  
El Reno, OK 73036  
Telephone: 405-295-6117 Fax: 405-422-2406  
Email: fifeb@canadiancounty.org

***Payment and Registration Must Be Received No Later Than November 13, 2019***

**Materials:**

A student reference manual will be provided. A battery operated calculator and pencil is required.

**Schedule:**

Class from 8:00 a.m. to 5:00 p.m. Monday through Thursday and 8:00 a.m. to 11:30 a.m. on Friday (ExamDay)  
Two— 15 min breaks, 1 in AM and 1 in PM; 1 hour lunch break.  
(***Times are subject to change at the instructor's discretion.***)

# REGISTRATION FORM

## IAAO COURSE 500

Assessment of Personal Property

December 9-13, 2019

Norman, Oklahoma



INTERNATIONAL ASSOCIATION  
of ASSESSING OFFICERS  
*Oklahoma Chapter*

**Please Print:**

**\*FORM ALSO SERVES AS INVOICE\***

IAAO National Member: (Check)

Yes

No

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Jurisdiction/Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

Email Address: \_\_\_\_\_

Fax: (\_\_\_\_) \_\_\_\_\_

|                 |  |
|-----------------|--|
| <b>\$450.00</b> | <b>Registration Fee (chapter members) (includes student reference manual)</b>  |
| <b>\$525.00</b> | <b>Registration Fee (non-chapter members) (includes student reference manual)</b>  |
|                 | <b>Text Book: Property Assessment Valuation (PAV)—Third Ed. (not required)</b><br><b>IAAO National Member: \$55.00 non-member: \$70.00</b> |
|                 | <b>Total Due—please make checks payable to: Oklahoma IAAO Chapter</b>  |

**Make Checks Payable to Oklahoma IAAO Chapter, and mail to:**

Canadian County Assessor's Office  
Brian Fife, Chief Deputy  
200 N Choctaw Ave  
El Reno, OK 73036  
Telephone: 405-295-6117 Fax: 405-422-2406