

Meeting Agenda/Minutes

# Senate File 295 Implementation Advisory Panel

DATE: FRIDAY FEBRUARY 6, 2015  
 TIME: 10:05 A.M. – 12:05 P.M.

LOCATION: ISAC CONFERENCE ROOM A, WEST DES MOINES, IA

FACILITATORS	Lucas Beenken / Julie Roisen		
ATTENDEES	Mike Albers – Polk County Auditor’s Office - phone	Jill Mauro – Polk County Assessor’s Office	Frank Rottinghaus – Floyd County Treasurer - Phone
	Kay Arvidson – IDR Property Tax Division	Dale McCrea - Muscatine County Assessor	Ed Saunders Cedar Rapids Assessor’s Office - phone
	Dave Bader – Thompson Reuters - phone	Erin Mullenix – Iowa League of Cities	Sandy Shonka – Cerro Gordo County Auditor’s Office - phone
	Carla Becker – Delaware County Auditor	Ted Nellesen – Local Government DOM	Jason Siebrecht – Linn County Auditor’s Office - phone
	Lucas Beenken – Public Policy Specialist	Dana Neuman – Mason City Assessor	Doug Smith – Thompson Reuters - phone
	Mark Castenson – Linn County Assessor’s Office - phone	Julie Riesselman – Tyler	Gordon Thompson – Linn County Auditor’s Office
	Jeff Garrett – Washington County Treasurer	Julie Roisen – IDR Property Tax Division Administrator	Kim Veeder – Black Hawk County IT Director - phone
	Ryan Lafrenz – Polk County Auditor’s Office	Rodney Ross – Cerro Gordo County Programmer	Amy Vermillion – Poweshiek County Assessor’s Office
	Mary Maloney – Polk County Treasurer		Jeanean Willems – Tyler - Phone

Agenda topics	Notes:
Opening Remarks / Introductions	<ul style="list-style-type: none"> <li>Meeting opened at 10:05 am with introductions of attendees.</li> </ul>
2015 Plan of Work	<ul style="list-style-type: none"> <li>The group reviewed the schedule for 2015 Business Property Tax Credit and Replacement Claim file deadlines and payments.</li> <li>Roisen reminded the group that BPTC credits are only given when the units in the Data Elements File and the Unit ID Database are perfect matches.</li> <li>Additional work for 2015 includes development, testing (by vendors), and launch of Agland file exchange by January 1, 2016.</li> <li>The Dual Class BPTC file will also be tested by vendors in the 3<sup>rd</sup> quarter. This will be a vendor test only.</li> <li>Other activities include development of the GIS component of the Local Gov Exchange portal.</li> <li>A question was asked about the impact of 2015 being an equalization year. Roisen reviewed that tentative orders are issued in the August/September timeframe, and final orders are issued in October.</li> </ul>

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<p>Corrections Update</p>	<ul style="list-style-type: none"> <li>• The Local Gov Exchange website was reviewed for the screens related to Replacement Claim Ministerial Corrections.</li> <li>• A Replacement Claim Ledger was shown that details all corrections, most recent displaying at the top of the page.</li> <li>• All adjustments for Replacement Claims occur in the second payment.</li> <li>• Treasurers have access if to this information if they have A&amp;A accounts.</li> <li>• If a Fix Levy Rate ministerial correction is made, the BPTC is automatically adjusted.</li> <li>• Garrett offered to assist with Treasurers who have not signed up for an A&amp;A account. IDR will provide a list of Treasurers to Garrett.</li> <li>• Tyler will be conducting New Treasurer Training and offered to cover this in the training if materials were provided to them before February 11.</li> </ul>
<p>TIF Discussion</p>	<ul style="list-style-type: none"> <li>• Becker continued the discussion regarding issues where payments are being applied to the base instead of the increment.</li> <li>• Becker will work with the DOM to identify possible problems, then Becker will communicate with counties.</li> <li>• If the increment component received too much in the Replacement Claim, it has to be corrected by the county before the March Installment is paid.</li> <li>• Becker has had a conversation with the State Auditor's office. The Auditor intends to review TIF Replacement Claim dollars next year.</li> <li>• Adjustments must be made by the March 10 (when IDR distributes the second Replacement Claim warrant for the fiscal year), for any necessary adjustments to be reflected in the March payment.</li> </ul>
<p>Disabled Veteran Homestead Tax Credit Survey</p>	<ul style="list-style-type: none"> <li>• Becker also reviewed a survey of 98 counties identifying the potential impact of including a qualification for the credit for veterans who are 100% unemployable.</li> </ul>
<p>GIS Participants for ISAC Working Group</p>	<ul style="list-style-type: none"> <li>• GIS is part of the working group agenda in order to comply with the legislative mandate to audit BPTC units, particularly the qualification for parcels within a unit to be contiguous. This requires some sort of mapping component.</li> <li>• This work will also include setting standards for how to create a file delivery process that is repeatable and works within the systems and structures now in place at the local government level. Also included in this work will be the timing of this implementation, and an education component to train the responsible parties at the local level on how to provide this information.</li> <li>• By 2017, 98 of 99 counties will have a plan in place for GIS. Six did not have a plan in 2014, but five of those six now have a plan in place.</li> </ul>

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	<ul style="list-style-type: none"> <li>• The Working Group decided to extend the invitation to these county GIS representatives: Micah Cutler (Franklin and Hardin counties), Kelsi Jurik (Polk County) and Mark Warren (Muscatine County)</li> <li>• Interested parties will also be invited representing county GIS vendors: Jeff Lewis (Schneider) and Mel Obbing (Sidwell). A representative from Midlands has not yet been identified.</li> <li>• Any other interested parties recommended by the Working Group should be shared with Lucas Beenken.</li> <li>• The Group decided to hold GIS meetings following the Working Group meetings so those interested in attending from the working group could also participate. Lunch for those attending both meetings will be coordinated.</li> <li>• Ryan Lafrenz and Amy Vermillion expressed interest in attending.</li> </ul>
Agland File Layout – Final Review	<ul style="list-style-type: none"> <li>• No additional comments were provided on the Agland File Layouts.</li> <li>• These are now final and will be posted on the IDR website.</li> <li>• IDR will also send the final layouts to vendors.</li> </ul>
Next Meeting Date and Location	<ul style="list-style-type: none"> <li>• April 24, 2015 10:00 – 1:00</li> <li>• GIS Representatives will join us at 11:00 AM</li> <li>• ISAC Offices, West Des Moines. IA</li> <li>• We will determine if we want to bring in lunch at the meeting.</li> </ul>
Meeting adjourned at 12:05 pm	

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1.	IDR will provide a list of Treasurers needing A&A Accounts to Garrett.	Chambers/ Arvidson	As soon as possible.
2.	DOM will provide Becker with possible problems in TIF Replacement Claim allocations.	Nelleson/DOM	As soon as possible
3.	Becker will communicate with Auditors for TIF allocation corrections.	Becker	Before the second payment of Replacement Claims for this fiscal year on March 10.
4.	Post Agland File Layouts on IDR Website and send the final layout to vendors.	Roisen/Chambers/ Arvidson	As soon as possible.
6.	Coordinate lunch options and costs for those attending both group sessions at future meetings.	Beenken	Prior to next meeting.