



City of Waukesha

City Hall,
201 Delafield Street
Waukesha, WI 53188

Meeting Minutes - Draft

Board of Review

Monday, May 20, 2019

8:00 AM

Council Chambers

1. Call to Order

2. Roll Call

Board of Review members Steve Martin, Diane McGeen, Alex Hansen, Sherry Larson, and Julie Bielinski were present.

Present 5 - McGeen, Larson, Bielinski, Martin, and Hansen

3. Confirmation of appropriate Board of Review and Open Meeting notices.

4. Select Chairperson and Vice Chairperson for Board of Review.

A motion was made to nominate Julie Bielinski as Chairperson by Sherry Larson, seconded by Diane McGeen. The nomination was accepted by Julie Bielinski and she was unanimously appointed as Chairperson by the following votes:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

4. Select Chairperson and Vice Chairperson for Board of Review.

A motion was made to nominate Sherry Larson as Vice-Chairperson by Diane McGeen, seconded by Julie Bielinski. The nomination was accepted by Sherry Larson and she was unanimously appointed Vice Chairperson by the following votes:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

5. Verify that a member has met the mandatory training requirements.

Board Members Alex Hansen and Julie Bielinski met the training requirements.

6. Verify that the City has an ordinance for the confidentiality of income and expense information provided to the Assessor under sec. 70.47(7)(af), Wis. Stats.

City ordinance 3.03(5) meets the requirement for Confidentiality of Information.

7. Review new laws.

8. Adoption of policy regarding the procedure for sworn telephone testimony and sworn written testimony.

Policy signed by the Board of Review Chairperson and on file with the Clerk.

A motion was made by Chairperson Julie Bielinski, seconded by Sherry Larson,

to adopt the written Policy regarding the procedure for sworn telephone testimony and sworn written testimony. The motion carried by the following vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

9. Adoption of policy regarding the procedure for waiver of Board of Review hearing requests.

Policy signed by the Board of Review Chairperson and on file with the Clerk.

A motion was made by Chairperson Julie Bielinski, seconded by Steve Martin to adopt the Policy regarding the procedure for waiver of Board of Review hearing requests. The motion carried by the following vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

10. Filing and Summary of Annual Assessment Report by Assessor's Office.

Report submitted by Assessor and on file with the Clerk.

11. Receipt of the Assessment Roll by the Clerk from the Assessor.

12. Receipt of the Assessment Roll and sworn statements from the Clerk.

13. Review the Assessment Roll and Perform Statutory Duties:

A. Examine the Roll

A motion was made by Chairperson Julie Bielinski, seconded by Alex Hansen, that the 2019 roll be accepted with the Affidavit as provided. The motion carried by the following vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

B. Correct description or calculation errors

C. Add omitted properties

D. Eliminate double assessed properties

14. Discussion / Action - Certify all corrections of error under state law (sec. 70.43, Wis. Stats.).

15. Discussion / Action - Verify with the Assessor that open book changes are included in the assessment roll

16. Allow taxpayers to examine assessment data.

Per Assessor, Paul Klauck, assessment data has been out on the website and available in his office and the Library.

17. During the first two hours, Consideration of:

A. Waivers of the required 48 hour notice of intent to file an objection when there is good cause

None filed.

B. Request for waiver of the Board of Review hearing allowing the property owner an appeal directly to the Circuit Court

A motion was made by Chairperson Julie Bielinski, seconded by Sherry Larson to approve Waiver requests from Board of Review hearing filed on behalf of WGBLT Investment, LLC for the following properties: 2105 Kensington Dr. Parcel #1330141, 1015 MacArthur Road Parcel # 1330140, 2100 MacArthur Parcel # 1330139, 2112 MacArthur Parcel # 1330138, 2147 Kensington Drive Parcel # 1330137, 2109 Kensington Dr. Parcel # 1330095, 1815 Kensington Dr. Parcel # 13309970002, 1807 Kensington Dr. Parcel # 1330097001, Kensington Dr. Parcel #1330142 and Kensington Dr. Parcel #1330096.

The motion carried by the following vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

Request for waiver of the Board of Review hearing allowing the property owner an appeal directly to the Circuit Court

A motion was made by Chairperson Julie Bielinski, seconded by Steve Martin that the Waiver from Board of Review hearing filed on behalf of Harp & Eagle, Ltd. for 314 W. Main Street Parcel #1305-339. The motion carried with the following vote:

Request for waiver of the Board of Review hearing allowing the property owner an appeal directly to the Circuit Court

A motion was made by Sherry Larson, seconded by Steve Martin, to approve the requests for Waiver filed by Woodman Food Market, Inc., 1600 E. Main St., Parcel #1007046 and Parcel #1007043. The motion carried by the following vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

Request for waiver of the Board of Review hearing allowing the property owner an appeal directly to the Circuit Court

A motion was made by Steve Martin, seconded by Sherry Larson to Postpone the decisions on the Request for Waiver for the matter of Menard Inc., 2315 Bluemound Road, Parcel #1127019 and Request for Waiver and Request to Testify by Telephone or Submit a Sworn Written Statement filed on behalf of Wal-Mart Real Estate Business Trust, 2000 S. West Ave., Parcel #1353424 to another meeting of the Board of Review (June 6th). The motion carried by the following vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

C. Requests to testify by telephone or submit sworn written statement

One request for Telephone Testimony from Wal-Mart postponed (see above.)

D. Subpoena requests

None at this time. Any subpoena requests can be signed the the Board of Review Chair at a later date.

E. Act on any other legally allowed / required Board of Review matters

18. Consider / act on scheduling additional Board of Review date(s)

Two additional dates have been scheduled at this time: Friday, May 31st, 12 - 5 p.m. and Thursday, June 6th, 12 - 5 p.m.

The meeting went into a brief recess and reconvened at 10:00 a.m.

19. Review Notices of Intent to File Objection

20. Proceed to hear objections, if any and if proper notice / waivers given unless scheduled for another date

[ID#19-0713](#) Assessment Objection Filings

Attachments: [BOR Objections May 20.2019.xlsx](#)

*1108 Buena Vista Ave, Parcel #1000-024, Property Owner: Michael Book
Assessed Value \$325,000, Homeowner Opinion of Value: \$255,000*

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowner, Michael Book, presented testimony. Joe Knuese from the Assessor's office provided testimony. Documents from Homeowner and the Assessor which were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Diane McGeen, seconded by Sherry Larson to uphold the valuation of the Assessor. The motion carried unanimously with the following roll call vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

Proceed to hear objections, if any and if proper notice / waivers given unless scheduled for another date

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*2852 Fox Lake Circle, Unit 23, Parcel #1409-113, Property Owner: Martin Gostisha & Janet Reagles
Assessed Value \$326,200, Homeowner Opinion of Value: \$289,000*

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowners, Martin Gostisha & Janet Reagles, presented testimony. Jennifer Katzner from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Larson, seconded by Martin, to uphold the valuation of the Assessor. The motion carried by the following unanimous vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

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*2307 Fox River Pkwy, Parcel #1378-088, Property Owner: Matthew Richmond
Assessed Value \$311,200, Homeowner Opinion of Value: \$296,920*

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowner, Matthew Richmond, presented testimony. Jennifer Katzner from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Chairperson Julie Bielinski, seconded by Alex Hansen, to uphold the valuation set by the Assessor. The motion carried by the following unanimous vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

Proceed to hear objections, if any and if proper notice / waivers given unless scheduled for another date

[ID#19-0713](#) Assessment Objection Filings

Attachments: [BOR Objections May 20.2019.xlsx](#)

*2812 Rolling View Drive, Parcel #981-134, Property Owners: David & Susan McClurg
Assessed Value \$351,300, Homeowner Opinion of Value: \$326,000*

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowner, David McClurg, presented testimony. Joe Knuese from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

Meeting went into Recess for lunch. Meeting Reconvened at 1:00 p.m.

A motion was made by Chairperson Julie Bielinski, seconded by Sherry Larson, to uphold the valuation of the Assessor. The motion carried by the following unanimous vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

Proceed to hear objections, if any and if proper notice / waivers given unless scheduled for another date

[ID#19-0713](#) Assessment Objection Filings

Attachments: [BOR Objections May 20.2019.xlsx](#)

1511 David Ct, Parcel #1358-038, Property Owners: James & Linda Hall
Assessed Value \$362,700, Homeowner Opinion of Value: \$328,320

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowner, Linda Hall, presented testimony. Mike Patnode from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Chairperson Julie Bielinski, seconded by Sherry Larson, to uphold the valuation of the Assessor. The motion carried by the following unanimous vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

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Attachments: [BOR Objections May 20.2019.xlsx](#)

110 E. Sutton Place, Unit D, Parcel #1314-152, Property Owners: Mark & Loree Daase
Assessed Value \$268,200 (lowered during Open Book to \$256,200), Homeowner Opinion of Value: \$241,000

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowners, Mark & Loree Daase, presented testimony. Jennifer Katzner from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Chairperson Julie Bielinski, seconded by Sherry Larson, to uphold the valuation of the Assessor. The motion carried by the following unanimous vote:

Aye: 5 - McGeen, Larson, Bielinski, Martin and Hansen

Proceed to hear objections, if any and if proper notice / waivers given unless scheduled for another date

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626 Lemira Ave., Parcel #999-097, Property Owner: Craig & Linda Matzke
Assessed Value \$196,500, Homeowner Opinion of Value: \$160,000

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowners, Craig & Linda Matzke, presented testimony. Joe Knuese from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Chairperson Julie Bielinski, seconded by Steve Martin, to uphold the valuation of the Assessor. The motion carried by the following vote:

Aye: 4 - McGeen, Bielinski, Martin and Hansen

Nay: 1 - Larson

Proceed to hear objections, if any and if proper notice / waivers given unless scheduled for another date

ID#19-0713 Assessment Objection Filings

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*337-339 Darlene Drive, Parcel #1356-072, Property Owner: Jacob Lloyd
Assessed Value \$229,000, Homeowner Opinion of Value: \$220,600*

The parties were sworn. The Board of Review Chair outlined the hearing procedures. Homeowner, Jacob Lloyd, presented testimony. Jenny Katzner from the Assessor's office provided testimony. Documents from Homeowner and Assessor that were submitted to the Board for consideration on file with the Clerk. The Board went into deliberation and reached a decision.

A motion was made by Chairperson Julie Bielinski, seconded by Steve Martin, to uphold the valuation of the Assessor. The motion carried by the following vote:

Aye: 4 - McGeen, Bielinski, Martin and Hansen

Nay: 1 - Larson

21. Adjournment

Meeting adjourned at 3:45 p.m. to May 31st.

"A majority of the Council members may be in attendance"

NOTICE: Any person who has a qualifying disability under the Americans with Disabilities Act that requires that the meeting be accessible or that materials at the meeting be in an accessible format, please contact Fred Abadi, 48 hours prior to the meeting at 524-3600 or by the Wisconsin Telecommunications Relay System so that arrangements may be made to accommodate the request.