



## **CEU Packet**

# **1004 - Oil & Gas Personal Property Discovery, Listing, & Mapping**

02 COLLECTING AND MAINTAINING PROPERTY DATA

### **Description:**

This class will bring knowledge about how to discover, list, map and audit oil and gas personal property assets. It provides an in-depth view of the practices and tools that are used to assist in the gathering of information and how to transform the information from paper to digital form.

**Start Date:** 9/1/2021 1:00:00 PM

**End Date:** 9/1/2021 2:30:00 PM

### **Learning Outcomes:**

- I. Discovery/Identification of Oil and Gas Properties
- II. Maintain and retrieve data from a database.
- III. Covert GIS data into web-based program.

### **Presenters:**

Jerry Wisdom PPS - Total Assessment Solutions Corp

James Hartshorn - EFS Geo Technologies

Eric McSweeney - Apprentice Information Systems

Topic
Safety
O&G Process
FERC/Transmission
History
GIS Data Collection
TOGA / Overview
Live Demo
EDGE/ Overview
Live Demo
Questions/Discussion
Total

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Ada, OK 74820

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## Jerry L Wisdom, PPS

<b>Experience</b>	<p>July 6, 2011 – Present Total Assessments Solutions Corp. Glenwood Ar. <b>Personal Property Appraisal Manager/ Operations Supervisor</b></p> <ul style="list-style-type: none"><li>▪ Personal Property valuations, discovery and GIS mapping for County Government in Oklahoma, New Mexico, Arkansas, Idaho, Colorado &amp; West Virginia.</li></ul> <p>1996-2011 Visual Lease Services, Inc. Holdenville OK <b>Co-Founder/Vice President – Operations Supervisor</b></p> <ul style="list-style-type: none"><li>• Multi-faceted corporation engaging in appraisal and discovery of all oil and gas related properties. GPS/GIS services, appraisal services for county government, consulting services, web design &amp; hosting.</li><li>• Developed procedures for investigation, discovery and valuation of omitted oil and gas properties.</li><li>• Developed the integration of GPS/GIS technology in the listing and categorizing of oil and gas related properties.</li><li>• Developed integration of GPS/GIS technology and database creation for county government road and bridge inventory.</li><li>• Completion of E-911 projects for 4 counties.</li><li>• 30 current employees</li><li>• Have completed, or in the process of completing revaluation and discovery of all oil and gas properties within 40 counties in the State of Oklahoma, 3 counties in Kansas, 4 counties in Colorado, 5 Parishes in Louisiana, 1 County in New Mexico. Including Compressors, Pipelines, Gas Storage Facilities, Gas in Storage, Gas Plants, CO2 Plants, Petroleum Refinery's, Crude Oil in Storage, Drilling Rigs, Oil &amp; Gas Wells, Mineral Interests and Salt Water Disposals. "All Oil &amp; Gas related properties".</li><li>• State of Michigan discovery, listing and appraisal approximately 75% of Michigan's Telephone &amp; Telegraph Company real and personal properties.</li><li>• Cadastral Mapping contracts for 8 counties in the State of Oklahoma</li><li>• Contracts with 77 counties and numerous companies designing and hosting web sites.</li><li>• Testifying before County Board of Equalization and Court Hearings in defense of Valuations.</li></ul>

## Learning Objectives

Learn to identify and practice safety precautions in the oil and gas industry f

Learn the process of oil and gas through a flow chart.

Learn the difference between transmission lines and gathering lines.

Overview of the discovery and listing process and how it has evolved.

Identification of oil and gas equipment.

Learn application for work flow of data collection and review data reports.

Visual Aid

Learn to utilize arc gis enterprise to streamline field data acquisition.

Visual Aid

Open forum for questions and discussion.

	<p>1985-1998                      J.W. Pump &amp; Supply, Inc.                      Laverne, OK</p> <p><b>Founder / President &amp; C.E.O.</b></p> <ul style="list-style-type: none"> <li>• Sales &amp; Service of Oilfield Supplies N.W. Oklahoma, Panhandle Texas, S.W. Kansas</li> <li>• 3 Locations Laverne (1985) – Beaver (1988) – Guymon (1991) Oklahoma</li> <li>• Master Service Agreements &amp; Customer base over 300 Companies ( Northern Natural Gas – Transwestern pipeline – ANR Pipeline – Delhi – Phillips Pet – GPM Gas - Oxy USA – Arco ect .ect .)</li> <li>• Master distributor ( KF Ball Valves-Balon Ball Valves-Arrow Engines-Norris O'Bannon-Cooper Group – H-F Pump Parts &amp; To Many others to mention)</li> <li>• 18 Employees</li> <li>• Buyer / Reseller / Reconditioner of Oilfield Lease Equipment. Tanks – Heater Treators – Compressors – Production Units – Wellheads – Pumping Units &amp; other Pipe &amp; Tubular Goods.</li> <li>• Developed Inventory codes for over 2000 items.</li> <li>• Developed Sub-Surface Pump Computer Program for Cost &amp; Run Time of Pumps &amp; Locations.</li> <li>• Invented No Gas Lock Tool for Sub-surface Pumps.</li> <li>• Sales and Service over \$ 15,000,000 Combined</li> <li>• Experienced in Pricing &amp; Cost Estimates for Pipe – Valves – Fittings – Oilfield Equipment</li> <li>• Installer of Oilfield Equipment</li> <li>• Relief Contract pumper of oilfield leases</li> <li>• General Building Contractor 2 new homes</li> <li>• Investor of Oil &amp; Gas Leases &amp; Properties</li> <li>• Mineral Interest owner - ,Royalty -Working Interest - Over-riding of Oil &amp; Gas Properties</li> </ul> <p style="text-align: center;"><b><i>Other Employment</i></b></p> <ul style="list-style-type: none"> <li>• <b>V.P. Asset Manager for Independent Oil &amp; Gas Company – Oklahoma- Kansas-Colorado-Texas</b></li> <li>• <b>Serve on Board of Directors for Independent Oil &amp; Gas Company in Oklahoma</b></li> <li>• <b>Duties include acquisitions of oil and gas properties including minerals, leasehold and equipment evaluations.</b></li> <li>• <b>Oilfield Supply Company Consultant</b></li> </ul>

Timed Outline/ minutes
10
5
5
5
10
10
10
10
10
10
15
90

	<p>1979-1985 Continental Emsco / LTV Energy Woodward, OK.</p> <p><b>Sales / Oilfield Production Equipment / Drilling Rigs / Pipelines</b></p> <ul style="list-style-type: none"><li>• 1979-1980 Pump Shop Specialist</li><li>• Responsible for all Sub-Surface Pump Repairs</li><li>• 1980 – 1982 Field Salesman</li><li>• Responsible for Sales N.W. Oklahoma, S.W. Kansas, Panhandle of Texas –Sales &amp; Service Drillings Rigs – Sales &amp; Service Production Companies – Gas Plants – Pipeline Companies - All General Oilfield Supplies.</li><li>• Trained in Sucker Rod Well applications Including Fiberglass Rods</li><li>• 1982 – 1985 Field Salesman – Production Equipment</li><li>• Responsible for Sales &amp; Service of New Production Equipment – Tubular Sales – Sub Surface Pumps for N.W. Oklahoma – Panhandle of Texas – S.W. Kansas.</li><li>• Trainer of Pump Shop Employees &amp; New Field Salesman</li><li>• Supervisor of all Fiberglass Rod Installations Panhandle Texas Area</li></ul>
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<b>Education</b>	<p data-bbox="467 195 1333 268"><b>1979</b> <u><i><b>Woodward High School Woodward, Ok.</b></i></u></p> <ul data-bbox="599 317 1315 541" style="list-style-type: none"><li>• <b>Appraisal Designation - IAAO Personal Property Specialist (2015)</b></li><li>• Successfully completed Vo-Tech Courses; <b><i>Excel – Power Point – Access</i></b></li><li>• Successfully completed all courses for Advanced O.S.U. Accreditation for State of Oklahoma and have Received Advanced Accreditation Certificate.</li></ul> <p data-bbox="589 558 1071 583"><b>Unit 1: Introduction to Assessor’s Office</b></p> <p data-bbox="589 594 987 619"><b>Unit 2: Real Property &amp; Appraisal</b></p> <p data-bbox="589 630 862 655"><b>Unit 3: Mass Appraisal</b></p> <p data-bbox="589 665 1042 690"><b>Unit 4: Income Approach to Appraisal</b></p> <p data-bbox="589 701 1133 726"><b>Unit 5: Business Personal Property Appraisal</b></p> <p data-bbox="589 737 902 762"><b>Unit 6: Cadastral Mapping</b></p> <p data-bbox="589 772 1003 798"><b>Unit 7: Agricultural Land Valuation</b></p> <p data-bbox="589 808 821 833"><b>Oil &amp; Gas Course II</b></p> <p data-bbox="589 844 826 869"><b>Oil &amp; Gas Course III</b></p> <ul data-bbox="599 938 1315 1136" style="list-style-type: none"><li>• Successfully completed appraisal courses Texas A&amp;M - <b><i>Refining, Petrochemical and Gas Processing Plant Appraisal for Ad Valorem Taxation - 1996</i></b></li><li>• Wichita State University Courses ( Ad Valorem of Public Utilities)</li><li>• <b>2001 &amp; 2002</b></li></ul> <p data-bbox="550 1152 1315 1241"><b>CENTER FOR BUSINESS INTELLIGENCE – GAS STORAGE OUTLOOK 2003 WORKSHOP: <i>Gas Storage Valuation- Models &amp; Techniques for Comprehensive Analysis (Houston Tx.)</i></b></p> <ul data-bbox="599 1255 1289 1732" style="list-style-type: none"><li>• Successfully Completed IAAO-Courses (<i>International Association of Assessing Officers</i>)</li><li>• <b><i>Course: 101 “Fundamentals of Real Property Appraisal”</i></b></li><li>• <b><i>Course: 102 “Income Approach to Valuation”</i></b></li><li>• <b><i>Course: 112 “Advanced Income Approach to Valuation”</i></b></li><li>• <b><i>Course: 300 “ Fundamentals of Mass Appraisal”</i></b></li><li>• <b><i>Course: 500 “Assessment of Personal Property”</i></b></li><li>• <b><i>Course: 552 “Personal Property Auditing, Basic”</i></b></li><li>• <b><i>Course: 553 “Personal Property Auditing, Advanced”</i></b></li><li>• <b><i>New Course: 500 “Assessment of Personal Property”</i></b></li><li>• <b><i>IAAO Wind Farm 101</i></b></li></ul> <p data-bbox="550 1780 1253 1839"><b><i>“2005 Preparation &amp; Trial of the Property Tax Assessment Appeal Seminar”</i></b></p>
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- Successfully Completed TAAO COURSES ( Texas Association of Assessing Officers)

**Course 12: “Appraisal of Oil & Gas Properties”**

- **2004 National USPAP Appraisal Course**

15 Hour Course

2016 - OTC 6.5 Hour Continuing Education Classes

2016 – Natural Gas Asset Valuation 10.5 hours

2017- H2S Certification Class

2017- 7 Hour USPAP Course

2017- IAAO 7 Hour Standard & Ethics

2017- IAAO 10 Hour Continuing Education Classes

2017- OTC 19 Hour Continuing Education Classes

2018- OTC 19 Hour Continuing Education Classes

2019- IAAO 11 Hour Continuing Education Classes

2019- OTC 15 Hour Continuing Education Classes

2020- OTC 9 Hour Continuing Education Classes

2020- 7 Hour USPAP Class 2020-2021

Oklahoma Appraiser Board Approval Number 011-041

- Kansas Department of Revenue Course
- **Oil and Gas Entry Level Valuation**
- **Oil & Gas Advanced Level Valuation**
- Colorado Department of Property Taxation
- **APR 451 - Oil & Gas Equipment Valuation**
- **APR 452 – Oil & Gas Pipeline Valuation**
- Western States Association of Tax Administrators
- **Unit Approach - Course 100**
- Michigan Department of Treasury Courses
- **Level 1 State Assessor Certification**
- **Level 2 State Assessor Certification**
- **S& P Global - Midstream Natural Gas Asset Valuation and Financing Course –July, 2016**
- **Member IAAO (International Association of Assessing Officers)**
- **Member IAAO Oklahoma Chapter**
- **Member IAAO Arkansas Chapter**
- **Certified Expert Witness for Oil & Gas Personal Property**
- **Instructor - Oil & Gas Personal Property for Arkansas Assessors & ACD – 2011**
- **Speaker 2013 /Western States Association of Tax Administrators Conference**

- **Instructor – Oil & Gas Property Identification & Valuation, Idaho Tax Commission 2015 -2016 New Mexico**
- **Speaker 2015 ESRI/CAMA Conference OKC. Ok**
  
- **Awarded the IAAO 2016 Arkansas Chapter Marvin C Russell Award for Outstanding Professional Contribution.**
- **Instructor – 2017 O&G Property Identification & Valuation – Wind Turbines / Wind Farm Valuations- Idaho Summer Conference 2017**
  
- **Instructor – 2019 O&G Property Identification & Valuation – Wind Turbines / Wind Farm Valuations- Norman, Oklahoma 2019**
  
- **Speaker – 109<sup>th</sup> Oklahoma Fall Assessors Conference/ Personal Property Oklahoma Wind Farm Valuations - Stillwater, Oklahoma 2020**

**Appraisals Energy Related Personal Properties**

**OKLAHOMA COUNTIES**

Atoka	Garfield	Osage
Beaver	Garvin	Oklahoma
Beckham	Grant	Pittsburg
Blaine	Grady	Roger Mills
Bryan	Harper	Seminole
Caddo	Kingfisher	Stephens
Canadian	Kiowa	Texas
Carter	Latimer	Washita
Cimarron	Leflore	Woods
Cleveland	Major	Woodward
Coal	Marshall	Jefferson
Custer	McClain	Hughes
Dewey	Noble	Love
Ellis	Nowata	Okfuskee
McIntosh	Haskell	Okmulgee
Johnston	Sequoyah	Comanche
Creek	Logan	Kay
Pottawatomie	Pontotoc	Wagoner
Washington	Lincoln	Pushmataha

**KANSAS COUNTIES**

Finney	Wilson	Greenwood
Seward	Kingman	Chase
Meade		

**COLORADO COUNTIES**

Rio Blanco - Moffat - Montezuma - Garfield - Adams - Dolores

**LOUISIANA PARISH'S**

Plaquemines Parish	Terrebonne Parish
St Mary's Parish	Iberia Parish
Cameron	

**NEW MEXICO COUNTIES**

Harding, Union, Roosevelt, Eddy, Rio-Arriba, Lea

**ARKANSAS COUNTIES**

Sebastian, Scott, Van Buren, Faulkner, Pope, White, Logan, Johnson

**IDAHO COUNTIES**

Payette

**WEST VIRGINIA**

Wetzel

	<p style="text-align: center;"><b><u>Special Projects</u></b></p> <ul style="list-style-type: none"> <li>▪ <i>Assisted in Development of Oklahoma State University Course: "Oil &amp; Gas Course III"</i></li> <li>• <i>Appraisal of Colorado Interstate Gas Companies – Boehm Underground Natural Gas Storage Facility 11-25-03</i></li> <li>• <i>Appraisal of BRG Petroleum – Hetherington 1-7 well – Kansas Department of Transportation</i></li> <li>• <i>State of Michigan Discovery, Listing and Appraisal of Telephone &amp; Telegraph Companies Real &amp; Personal Property.</i></li> <li>• <i>September -04 Appointed "Special Investigator" by and for the First Judicial District Attorney for the panhandle of Oklahoma for current ongoing fraud investigation concerning Oil &amp; Gas related property and equipment.</i></li> <li>• <i>Estate Valuation of Oil &amp; Gas Minerals and Oilfield Personal Property in Kansas and Oklahoma.</i></li> <li>• <i>2007 Colorado Department of Property Taxation – Revalued all property for the 2008 BEL's (Basic Equipment List) for entire State.</i></li> <li>• <i>2016 Developed Oil &amp; Gas Equipment Cost &amp; Depreciation Tables for Arkansas Coordination Department.</i></li> </ul>
<b>References</b>	Furnished upon request

**Prior 4 Years – Depositions, Testimony & Court**

***2016 Deposition- 2016-CJ-2015-470 -Comanche County Oklahoma Blue Canyon vs Comanche County BOE***

***2017 Deposition- 2016-CV-2016-22 -Johnston County Oklahoma Vulcan Materials vs Guyla Hart Johnston County Assessor***

***2017 Testimony New Mexico Legislative Interim Revenue Stabilization & Tax Policy Committee- “Auditing Oil & Gas Equipment for Property Tax Purposes”***

***2017 Deposition- 2013-D-101-CV-2013-00014 –Harding County New Mexico Oxy USA vs Harding County Board of County Commissioners***

***2017 Deposition- CJ-2015-470 -Comanche County Oklahoma Blue Canyon vs Comanche County BOE***

***2019 Deposition- CJ-2015-470 -Comanche County Oklahoma Blue Canyon vs Comanche County BOE***

***2019 Deposition- CJ-2016-241 –Canadian County - CJ-2016-61-Kingfisher County, Oklahoma Kingfisher Wind vs Canadian County County BOE***

***2020 Deposition- CV-2017-44, CV-2018-24, CV2019-18 –Dewey County – Oklahoma - Taloga Wind vs Dewey County County BOE***