

MINUTES
REAL PROPERTY TAX ADMINISTRATION COMMITTEE
Wednesday, March 15, 2000 1:00 to 5:00 pm
Clarion Inn and Suites, Latham NY

Facilitator: Dan Curtin
Recorder: Audrey Barnes

Members Attending: Tom Frey, Rick Hubner, Edye McCarthy, Susan Otis, Fred Pask, Anne Sapienza, Dorothy Martin, Steve Curran, Bill Cinquanti, Tom Bloodgood, Ron Shetler, Jack Shuttleworth, Tom Griffen, Dick Harris, Vince O'Connor, Richard Sinnott,

Others Attending: Ruth Henahan, JoAnn Whalen, Geoff Gloak, Doug Barton, Joe Horne, Don Card, Jeff Jordan, Paul Miller, Bill Godell, Bruce Sauter, Dave Williams, John Burin, Assessor, City of Elmira, Cathy Edwards, Assessor for 3 towns in Chemung County

a. Get Organized (Dan Curtin)

Bill Cinquanti introduced Dorothy Martin as the newest member of RPTAC.

The agenda was approved with the addition of Electronic Communications Team topic and update on Rensselaer County for today. The mission/purpose discussion was moved to tomorrow's agenda.

Minutes from December and January meetings were approved with the correction on the bottom of page 3 to reflect flip notes, not flop notes in the December minutes and the correction of the spelling of Tom Frey's last name in the January minutes.

Statement was made regarding a nice job done on the notes.

b. Leaders Reports

County Directors - Bill Cinquanti stated there was nothing to report.

Assessors - Fred Pask also stated that there was nothing to report.

ORPS - Tom Griffen

Tom used this portion of time to brief the group on Rensselaer County. Tom stated that ORPS respectfully disagrees with their local law and believes the County is clearly violating the RPTL. He feels we need to discuss whether this should be the first case out of the box, i.e. in exercising the State Board's authority under RPTL, Section 216.

Counsel's office feels the safest approach and most likely to be successful is an action by Attorney General questioning the validity of the local law. It seems clear to ORPS and the Department of Law that this is one of those areas where Section 1532 "pre-empts" the field, and prohibits local legislative action that conflicts with the State statute. However, the Rensselaer County attorney is of a different opinion. Rich stated the attorney's letter offered "specious" arguments. (The term specious was referenced through the rest of the afternoon, many not knowing what it meant. According to Webster's Dictionary, "specious" means having superficial appeal, though containing fundamental errors in reasoning, devoid of truth.) The issue now would be whether the Attorney General's office would be willing to challenge the local law. Discussions with the Assistant Attorney General will take place shortly

Alternatively, ORPS could initiate a hearing under Section 216; however, the first respondent would be Jeff Jackson, who would then likely have to implead members of the county legislature. At the end of a Section 216 process, the State Board would issue an order directing parties to do something - probably for the County Legislature to rescind the local law; assuming they then do nothing, we'd have to initiate a judicial proceeding to

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compel compliance with the Board's order. (This is the reasoning for pursuing the avenue through the Attorney General's office, rather than spending months determining validity of jurisdiction.)

ORPS has spoken with the Assistant Attorney General who has indicated some ambivalence about whether they have sufficient resources to challenge the County of Rensselaer particularly since this issue doesn't include health or safety matters.

Vince stated that in a survey done of Rensselaer County towns, 11 out of 16 jurisdictions stated there were not huge problems. Backlogs have been taken care of; however, there are issues around quality. Vince has spoken to Joe Cybulski to set up an appointment with Rensselaer County to trace the flow of information from county clerk to assessor. Once we understand the flow, we can understand where the bottlenecks are. Joe Cybulski said the meeting should be held with Vince Ruggerio, their data processing person.

Jack Shuttleworth asked who was doing the annual certification of maintenance of maps? Vince thought in the past it was the senior tax map technician. Bill Godell stated that the county director should be the one who certifies the tax maps, but this is not something that ORPS monitors. Rick stated that this was discussed previously and needs to be checked. Vince stated that ORPS followed up on five counties last year. Tom stated that staff are keeping on top of where we are recently.

Assessors asked if tax maps are getting to Rensselaer County assessors in timely and accurate fashion. (An issue for assessors is the lack of data processing support from counties.) Vince stated they are current now, but could possibly fall back again.

Tom Bloodgood asked what the local law actually stated. And if a suit is filed, could /would the tax map issue be solved? Discussion took place regarding the possibility that if we sue, an order may not be in place by the time the local officials involved are up for reappointment or reelection.

Tom stated that in meetings he had with Henry Zwack, Henry stated he wanted to use the 911 maps. Tom says they aren't accurate enough to provide the base map; too bad they didn't use the GIS map. Steve stated that Dutchess County used the 911 maps, converted them manually, no rubber sheeting was done for base map.

Action: #5 Check tax map rules for who certifies and who signed. (Dick)

#6 ORPS and county director executive board will mull problem and options and decide.

#7 Write to OFT regarding digitized maps and standards - how does county integrate GIS across all county functions. (Check on NYC watershed). (Steve and Dick)

c. **Valuation Issues** (Bruce Sauter, Dick Harris, Don Card, Jeff Jordan)

Utility Divestiture -

The purpose of this topic is to discuss the bill proposal with RPTAC and respond to questions or issues. Tom Frey stated a few members met with Tom Griffen the previous evening to discuss. Mr. Frey stated that the Assessors' position is that the Agency jumped the gun on changing its method of valuing electric generating facilities, and that they left the meeting last night with the agreement to disagree. He went on to say that the data is not good enough to use for market or income approach, that there is no case law that they are not specialty properties. A number of municipalities will be greatly affected by shifting of taxes from a town with such a plant to towns where the plant is not located. Assessors have had discussions with Governor's office and other organizations and are moving forward hoping to get the State Board to rescind the equalization rates set by the new methodology and to go back to the previous cost approach, until ORPS has had time to determine approaches are valid.

Bill Cinquanti stated that the County Directors agree with the position that the Assessors are presenting.

Tom Griffen stated he thought it should be talked about it and turned the topic over to Jim O'Keeffe to talk about what the bill is intended to do.

Legislative proposal - Jim summarized the proposal

Public Service Commission (PSC) authorized New York State electrical providers to divest themselves of electric generation plants. These plants have been sold and are now being run by companies - multi state, or international corporations that have come into New York and are selling their electricity. The proposal is trying to address the fact that the values of the electric generating plants will decline, they are no longer built into rate base of the electrical provider. Once the value has declined, how far and what effect will this have on the valuation process and local assessments. The possibility exists that the state equalization rates can have unintended perverse tax apportionment effects. ORPS Legislative proposal #6, approved for introduction by the Governor as a departmental bill before the Legislature, attempts to solve the equalization problem by taking the plant out of process by local option exercised by the assessing unit, school district or county adopting a resolution or local law to exempt the facility from real property tax. If the property becomes exempt, there would be a PILOT agreement for owners to officially make payments in lieu of taxes. The assessing unit would mirror existing processes in negotiating a PILOT. If a PILOT could not be agreed to, a default formula would be used, equal to 1999 taxes paid. Once the property is off the rolls and excluded from the equalization rates for apportionment, a separate tax apportionment rate would be used, rather 1999 rates, to apportion 2000-2001 school taxes. There are also provisions allowing the county, school district or assessing unit to institute a phase-in over a period of 5 years, when there is a loss in AV of 10% or more on the assessment roll. For school aid purposes, we compute a full value equivalent of the PILOT to keep the district from looking too poor. Versions of this bill have been discussed for over a year and a half. Dave Williams has done simulations displaying the impact if the bill is enacted.

Bill Cinquanti asked if the bill was pending , why was methodology changed? Tom G. stated that from ORPS point of view, we'll either change it this year or next to reflect market condition. Tom G. stated that in early 1998 ORPS wrote in response to a Dave Briggs letter that we were going to look at the three approaches to value.

This worries Tom G. personally and the Administration that in September no one will understand why the taxes went up. A mailing will go out to affected municipalities and then to everyone generally for information purposes. Anne Sapienza recommended doing a press release to communicate the information.

Dave Williams stated there are about 25 municipalities where rates change from last year to this year by more than 5 percent in the simulation, driven by valuation changes where generating plants are located.

Jack Shuttleworth asked if there was a phase in approach considered?

There was discussion over the ability of a plant owner to reopen the 1999 assessment for judicial review. It was explained that this was added upon request to address the situation where the statutory PILOT was in effect, but the assessment in roll section 8 was artificially low. It was suggested other provisions addressed this situation, and the provision allowing the 1999 assessment to be challenged was unnecessary.

Dan stated we need to move on to other issues, then revisit this topic if sufficient time remains.

Utility Inventory (Don Card) -

Don stated that in December he was asked to explore the possibility of supplying local inventory to municipalities and training local officials in the use of such information. The group met this morning and Don stated he felt they tackled those issues.

What inventory is to be used and how will this (electric generating plants) be valued? The assessment community, utility companies and ORPS should put training program together, for next year, the purpose of the session would be to foster a better understanding on how these properties are to be valued.

Don stated that discussion around sharing the utilities inventory was status quo; there wasn't much movement. He tried to get approval for the utility companies or ORPS to distribute inventories to municipalities, but was not successful. A suggestion was made that an article be published in the "Assessors' Association Bulletin" to make members aware that they have a right to request the information directly from the utility companies.

Dick Harris stated that utility companies felt that if a request from an assessor came in, the company representatives would meet with the assessor to discuss the matter. Utility companies were reluctant when asked what if all 800 municipalities requested the information. They stated they couldn't accommodate that. It is probable that not every assessor needs or wants inventory data. The utility company representatives thought it was good that they were in same room talking.

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A statement was made that new owners of these properties are not subject to regulatory controls. Some utility companies that have been regulated were OK with paying more real property taxes than they should have; however, those new owners, no longer regulated, will not over-pay real property taxes.

Edye asked Don if he could figure out if the private right of way inventory is assessed as special franchise? Don stated that he has no way of knowing what should or shouldn't be reported. In response to another question, Don stated that ORPS is required to provide an advisory value only if a municipality is doing a reassessment. The law was amended in 1990 stating ORPS is only obligated to provide advisory appraisals in instances where a revaluation is being done.

Next steps: The group agreed to move forward with training courses for county directors, assessors, utilities and ORPS staff.

Action - #8 Rich will draft an article for the Survey/assessor bulletin to alert assessors about the special franchise "prior occupancy" exception and share with Anne, Steve and Tom to see if it answers questions asked. Possible article for IAAO journal.

Valuation Team Charter

This was discussed at the previous meeting. Bruce stated the background issues and why he felt we should form a team.

A number of different issues constantly come up and if the group can focus on issues that come up and separate valuation issues from tax policy, hopefully, consensus will be reached in a way that we all can live with. Some things that were mentioned were timber valuation, industrial valuation, etc. . . . The team would consist of nine people, three from each organization ORPS, County Directors, and Assessors, with goals and objectives and a tentative communication plan.

Tom G. stated that some may ask why Bruce Sauter was suggested as Team Leader? Bruce is the core process manager for valuation and we need to integrate efforts in ORPS regarding various valuation topics. Management felt that he was the best candidate to spearhead the project.

Anne stated that as discussed at the previous meeting, a major concern is that we need to clean up former teams before creating a new team. Dan indicated that those teams will be discussed on Day 2 and a summary will be provided.

The purpose of this topic and review of the Charter was to provide an opportunity to ask questions now. Decision regarding the Team can be made after the discussion around teams on Day 2.

Template Review

Bruce stated that the review of the templates and procedures involves a combination of identifying the plan that has been ongoing and giving everyone involved an idea of what's coming up. Bruce worked with Albany, Regional and SAS staff, the leadership of assessors and county directors to identify people for this review process.

Initial review has begun. The first 7 of the 52 guidelines were agricultural and have been distributed for review and comment. As we move to other types of property, we will share with those people and keep them informed.

The first templates and valuation procedures provided were in a format that was not acceptable, so the

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project is a couple months behind. The completion of all 52 templates and valuation guidelines is scheduled by this summer. The template for the dairy farm guideline has been rewritten and distributed for review. Comments from 40 to 50 people have been good.

In reviewing guidelines, the revised format is much more concise and content problems limited. Bruce will call Pomeroy on Friday, March 17th. The other agricultural templates and guidelines are scheduled to be delivered by the end of this month from Pomeroy, and names of reviewers will be identified.

Rick asked about the review process. Bruce stated the format and has assumed everyone understands how to do an appraisal, he will provide guidelines. Structure for the guidelines are first general appraisal guidelines, followed by specific data for property types in the class.

Tom Frey asked whether there is a list of all the template and guidelines being developed.

Vince asked if mass appraisal methodology was considered in the revision of the template. Bruce said the guidelines were realigned and they tried to cross reference them to property classes and can now easily relate to mass appraisal approaches and techniques.

Rick asked about updates to manuals and the fact that he hasn't received updates to cost tables.

Action - # 19 Bruce will find out when last updates were distributed and when the next ones will be done.

Bruce also stated he wants to be able to link into other databases, ability to use the internet for reference purposes.

Edye asked if guidelines will be completed in the time frame originally proposed and Bruce stated yes, ORPS has contracted with Pomeroy Appraisal to delivery all by a certain date. As stated previously, the project is currently two months behind, but will make up time and guidelines 1 to 7 will be provided in the revised format by end of the month.

Electronic Communications Team - Bill Godell

Bill referenced the memo dated March 6 regarding this team. The purpose of creating the team was to address issues concerning ORPS Strategic Plan Goal 4, to increase the percentage of assessing units that use electronic access as the business standard for communication of information.

Anne asked if this was an internal team within ORPS and Bill indicated that we are looking for two representatives from the assessors and county directors to act as liaisons to their respective groups. The internal work will be done at ORPS, i.e. setting standards, interfacing and moving out into ESS, Sales, etc. The team wants to develop standards for communications.

Dan reminded the group of a prior discussion stating that "it would be great to be able to get equalization rates over the internet".

Rick Hubner and Paul Manaicek agreed to become liaisons. Attendance is not required at all meetings. Anne expressed concern regarding knowledge management and the large percentage of the assessment community that does not have internet access or even a computer. Tom introduced Ruth Henanhan as the newest member of the management team at ORPS. Ruth shared information regarding a state program where computers the State no longer uses are released for use in school districts. Tom Bloodgood stated that you can put computers on desks of assessors, but if they don't have broad band width, it isn't functional. Frank stated that some issues regarding this

are being addressed with the Salesnet. Rick emphasized that we've been trying to do this for 10 years and there needs to be two-way communication.

Anne wants to stress to the team to keep local government in forefront of decision making. Sue stated that you need to keep local government involved and educate them in the capabilities available.

Bill stated that this is a 5 year outlook, with the ability to try to put a yearly implementation plan in effect, knowing it could change as technology changes.

Tom Frey stated that the ability to look at data via the SalesWeb is wonderful, needs to be communicated. Recommended that the Assessor's Bulletin is the best way to get the information out there.

Clarification regarding SalesWeb and SalesNet was made. SalesNet is used for sales reporting purposes and SalesWeb is for information purposes.

Utility Deregulation Legislative Discussion - continued

Questions asked -

- How does section 727 of the RPTL (i.e. 3 year prohibition against changing assessments) affect a PILOT agreement since taxable assessed value doesn't matter anymore, e.g., Newburgh where they recently settled a big case.)
- What if a locality has just settled a case with a generating plant and the county decides to opt in, does assessor have to negotiate a new PILOT program? Jim stated yes, a new PILOT would have to be negotiated.
- Would you be able to negotiate a PILOT similar or same as previous agreement? Jim answered "yes".
- Regarding the Newburgh settlement - would the PILOT agreement continue with new entity that bought the property? Jim answered "yes", agreement is binding for 10 years, but renegotiable every year. Agreement doesn't change with change in ownership.
- What happens if they don't pay? County can't enforce under article 11; enforcement would be by way of judicial action to enforce payment as in an action on contract. Something should be stated in the legislation that the agreement for PILOT should be in the form of a contract.
- Capital improvements - how do capital improvements get added in? Joe indicated that it depends upon a voluntary PILOT inclusion or defaults to last year's taxes. In the absence of an agreement, assessment will include tax payment, if capital improvement, built within the PILOT agreement.
- Why limited to just generating plants? Why not all large parcels?

Statements made -

- Even if this legislation is passed, some things still need to occur, i.e. you need a signed agreement for PILOT by effective date of resolution.
- Someone stated that they didn't have a problem putting on roll section 8. Biggest concern we're in overdrive with something and trying to band aid something else.
- This is probably something the Equalization Subcommittee has been talking about, that is removing large

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utility and putting the property into the exempt section of the roll, doesn't feel it's overdrive, sees it as something a long time coming, and happy to see it.

- The overdrive statement is in regard to the methodology change, the concern is the fall out given tax shifts.

Once a budget is adopted and funds from other sources are subtracted, will the PILOT be subtracted from the levy? Rich stated that PILOTs are done according to generally accepted municipal accounting procedures which are approved by OSC. Rich stated these procedures have been long established, if a municipality violates procedures, they violate the law. PILOTs are taken "off the top" before the levy is apportioned to the various cities, towns or portions thereof. These procedures apply to school districts also.

Oswego - please explain section 1227 rates for apportionment where a large generating facility is grossly over assessed. Answer - for the 1999 assessment roll we used ORPS full value and the local assessed value for equalization rates. Next year (2000) the facility would be fully exempt and off the assessment roll. PILOT agreement would cover taxes and the equalization rate should be 100.

Tom Frey stated that the RPTAC package was received too late to read and make determinations, members need ability to have meeting materials sooner.

Meeting begins at 8:30 am tomorrow.

Day 2

**MINUTES
REAL PROPERTY TAX ADMINISTRATION COMMITTEE
Thursday, March 16, 2000 8:30-1:00pm
Clarion Inn and Suites, Latham NY**

Facilitator: Dan Curtin
Recorder: Mary Beth Cimino

Members Attending: Vince O'Connor, Frank Ferrari, Tom Griffen, Richard Sinnott, Dick Harris, Tom Frey, Rick Hubner, Edye McCarthy, Susan Otis, Fred Pask, Anne Sapienza, Dorothy Martin, Steve Curran, Ron Shetler, Bill Cinquanti, Tom Bloodgood, Jack Shuttleworth

Others Attending: Jim O'Keeffe, Ruth Henahan, Joe Horne, Robert Gawrelski, Geoff Gloak, JoAnn Whalen, Mark Lavigne, (CTG), John Burin, Cathy Edwards, Doug Barton, Fiona Thompson, (CTG)

Teleconferenced In: Rick Heydinger, Public Strategies Group

Dan opened the meeting, reviewed agenda and set up teleconference with Rick Heydinger from the Public Strategies Group.

Annual Reassessment

Regional Meetings - Vince started the meeting stating that, at the last RPTAC meeting, he was asked to have/hold discussions regarding annual reassessment in regional offices. This has happened in all of the regional offices as well as at the AOT and the NYS Association of Counties. Tom attended some of these sessions. Guidelines, procedures, maintenance aid proposals and draft applications were discussed. Vince stated he felt the meetings were well attended.

Update CTG Project - Mark Lavigne, was introduced to the group. He is from the CTG's Applied Research Center which is based in Albany. Mark spoke to the group about how CTG plans to help improve ORPS' new annual reassessment program. In November, a day long meeting with ORPS was held in Albany. A simulation model needed to complete reassessments was developed. Two sessions were held where the feedback on the model, implementation, options, tasks were discussed and it was decided where to go and who should we talk to from here. Six local workshops were held across the state by CTG. 162 participants took part. 472 ideas gathered in the workshops were put into clusters and prioritized. CTG is currently analyzing the information, compiling it and a draft report will be sent out in April to the people who attended the workshops as well as ORPS. At the workshops, an accurate portrayal was developed regarding how best to target resources. There were consistent results from all groups talked to regarding the high level of frustration and skepticism about any real changes taking place in Real Property Tax administration. Participants wanted to know how highly engaged and committed to the process ORPS is. Also, they were interested in how highly politically charged the annual reassessment program is. Other observations were made by attendees. It was stated that communication with ORPS isn't always the best. RPTAC does not always know what's currently going on or know about current happenings in a timely fashion. They stated that they didn't have enough time to prepare for the new program. Even assessors conducting reassessments every 3 to 4 years would not have enough time. ORPS has been hearing the same thing from other

sources. PSG is working with ORPS on a long term plan to improve property tax equity statewide. ORPS and CTG met last week to prepare for final joint workshop and to work on the final report. CTG is currently drafting the report and will send out the final report to the 162 participants and ORPS as soon as it is available (should be the end of May). It was also noted that the report will be available on CTG's website. PSG is currently gearing up and going to begin focus sessions for their project before the report goes out. They will have a copy of the results of the workshops, the 472 ideas and draft report to work with.

Tom Frey questioned who was sent invitations for the meeting in Syracuse. CTG has chosen a number of participants from the local workshops.

PSG Project - Rick Heydinger, from PSG, was teleconferenced in from Minnesota. PSG is a firm of 15 people that has been in business for a decade and consists of people who had been long time public officials. PSG deals with all levels of government. Rick explained that PSG gets their notoriety from David Osborne. PSG deals with a variety of government organizations, with the majority of the client base being 40% state and 40% local organizations. PSG helps organizations design a strategy for delivering services to customers and helps them deliver on results. PSG has worked in NYS over the past 4 years; Mental Health, Dept. of Budget, Dept. of State, to name a few.

Rick asked the question - What is PSG trying to accomplish? Building on the CTG project, PSG is trying to stand back and craft a long term strategy for achieving and maintaining a tax equity. PSG sees two deliverables by Labor Day. The first is to layout a strategy for achieving tax equity in NYS and the second is to provide ORPS and the assessment community with an understanding of the steps for getting to that vision over the next 5-7 years. Rick stated that PSG does not think they have all the answers. There are a variety of perspectives that they need to get information from in order to achieve their goal.

The first step in the project is to once again go out in the community and talk to stakeholders. CTG just did that with the workshops they recently held. PSG will be asking "How to achieve tax equity in NYS?" The purpose of focus sessions will be entirely about receiving input from the participants. PSG will be "sponges" at these sessions. There will be sessions in Syracuse, Albany and Long Island - each location will have 6 sessions for a length of about 2 hours and comprised of about 20 participants in each. There will be 18 different sessions all together. The focus groups will be organized around stakeholders groupings. There will be individual sessions for Government officials / people involved in real estate business / assessors / school officials / taxpayers, and county directors. ORPS is coordinating all the material for these sessions.

PSG will summarize the material from these focus groups and bring it to the Strategy Design Conference. The conference will be in Syracuse during the first week in May (*Note: dates are 5/9-10*). There will be six people from each of the six different stakeholder groups - County Director's / Assessors Association / School officials, etc.

A Design Lab will be held using information from focus sessions and strategy design conference. About 10-15 people will participate in the 2 day lab to determine what would a vision look like for achieving and maintaining equity across the state 7 years from now.

Tom Frey feels invitees to focus groups need to be carefully selected to get a good diverse group. Tom Griffen stated that the letters have been sent out already. Vince O'Connor had the regions put a list together of potential attendees. He feels this list represents voices from all areas.

Tom Frey stated that the assessors are tired of going to focus groups and not seeing results. Bill Cinquanti agreed with Tom Frey but feels these sessions will be good but, because of the different focus, they will be well received.

Anne Sapienza questioned the direction of the project - will PSG be working on a plan to achieve and maintain tax equity assuming annual reassessment or be more open minded by asking for input on the various ways to achieve and maintain tax equity. Rick responded by saying that PSG will explore all ways.

PSG will hold a second Strategy Design conference in June (*Note: dates are 6/22-23*). After this conference, they will have a fairly clear idea of what they need to do. Following this phase PSG will develop a prototype of their concepts using a piece of software, that will allow PSG to demonstrate what they think the system will look like in 7 years. Next PSG will get input from stakeholders and redesign the prototype using this input. PSG will then share the prototype and get more feedback - approximately June/July.

Once the prototype has reached this stage, PSG will look at various roles everyone plays in system. What role do

county director's, ORPS, assessors, etc. play? How are roles going to change? This will enable detail planning to occur regarding how to get from here to there in 7 years.

An action plan for moving ahead is scheduled to be developed by August/September.

Edye McCarthy asked if this means the annual reassessment plan will be put on hold? Tom Griffen said the PSG project will focus on what places want to do long term - annual assessments will not be put on hold for those places that want to do annual reassessment. Vince O'Connor stated there are 95 places interested in annual reassessment projects this year.

Bill Cinquanti had a request for Tom and Vince. He would like a meeting with ORPS to discuss the goal in the assessment administration process. Bill suggested inviting ORPS regional staff to the meeting because they have a good understanding of assessment administration.

Tom Bloodgood questioned the superscript after Design Lab (TM superscript.) What is this? - Rick H. replied that it is just a process they use. It is a trademark - not a patent.

Rick Heydinger closed the phone call with an invitation to contact him with any questions, concerns or ideas that anyone has. Dan Curtin has all Rick's information such as name, email address, fax, etc. Please feel free to correspond with any comments.

Current Issues

Because Tom Griffen was leaving before end of meeting, the agenda was adjusted to cover current issues before he left.

Fred Pask - Advisory Appraisals - what is ORPS policy regarding providing defense for Advisory Appraisals. Tom Griffen stated that ORPS can provide information on an informal process - we can talk over phone, provide support in terms of helping you draft an RFP to hire an appraiser. However, we lack resources/manpower to do appraisals to use in court. We don't have enough staff to provide advisory appraisal design across the state.

Edye - how many advisories do you do a year? Vince stated that we probably provide about 25-50. We give them all the information we have and explain what we can for them - we don't have enough staff to do more than that. Edye stated that she is concerned because there are assessors who don't know ORPS will not provide defense for the advisory appraisals. She feels that municipalities should be aware that ORPS will not back them up.

ACTION ITEM: Advise staff of advisory appraisal - defense policy to give to assessors - Vince O'Connor/Dick Harris.

Agenda Item for future meeting: Revisit advisory appraisal rules regarding sharing with assessors and companies. Vince will look into it.

Steve Curran brought up the issue of the Annual Reassessment Program. Steve stated that he has a concern, in the Newburgh region, regarding the sufficiency in the amount of staff to handle all the work associated with Annual Reassessment Program if many jurisdictions are looking for support. Steve talked with Tom Griffen, Vince O'Connor and John Wolham and has asked ORPS to look at the situation to see if they can help. Steve feels there needs to be an initiative taken to get additional staff in order to be prepared for the future.

Vince O'Connor stated that he is aware of the problem. The Newburgh region has lost people to other parts of agency and elsewhere. He has talked to John and Tom and are presently looking to hire 14's and 18's. He is working with Don Parker on giving an exam as there is currently no list.

A question was asked if ORPS will have direct role in Nassau county reval? Tom Griffen stated that ORPS currently does not have the people to help Nassau County with their revaluation. At best, ORPS will be in there to monitor what's going on - that's all.

ACTION: Report on Newburgh staffing - V. O'Connor

Edye McCarthy raised an issue regarding Aid Rules and Procedures. She said that she, Tom Frey, Anne Sapienza and Tom Griffen met regarding the thresholds for aid payment in those instances in which we disagreed with the aggregate values for a class of property. Where are we with this? Frank Ferrari responded that hearings are set up for both maintenance aid and training rules. Once the hearings are held we will proceed with finalizing the Rules and procedures. Currently, we have held off doing any denials on 1999 Maintenance Aid applications. We will be reviewing these applications using the new rule and procedures.

ACTION: Provide report on impact of new procedure on State Aid for 1999 - Frank Ferrari

Anne Sapienza wants to thank Mark and CTG for wonderful job done.

Rick Hubner would like to know where requests for the training consultant stands- Professional Development Program in NYS. Frank gave an update. Currently, the request has been sent to several prospective bidders. We are waiting to hear from GOER.

Annual Reassessment (continued discussion on annual reassessment issues resumed)

Robert Gawrelski discussed three DRAFT documents regarding the Annual Reassessment Plan. Bob handed out the template and instructions of the DRAFT Annual Reassessment Plan and a findings form to be completed by ORPS staff. They will be out on the web shortly. Bob stated their intentions are for people to use the template so information comes back to them in a consistent manner. The annual reassessment plan is developed by the assessing unit to describe the approach it will take to maintain a program of annual reassessment. The plan should include an explanation of how the assessing unit will comply with the requirement to inspect and reappraise each parcel at least once every six years, inclusive of the resources and time-frames which make the plan a viable one. This plan, which can be developed in collaboration with ORPS, will be reviewed by ORPS when an application is submitted for Annual Maintenance Aid pursuant to RPTL Section 1573 (2).

Sue Otis raised the question - are all regional staff trained together so there determinations are the same? Vince stated that Bob Mancuso and Bob Gawrelski went to the Southern region to do a roll-out and will do this in all regions. He stated consistency is important and that is why these forms are being used. Also, training in SPSS is now occurring for staff in order to keep analysis consistent. Tom Bloodgood suggested anything with DRAFT should be dated.

There will be a meeting with regional managers within next few weeks to discuss the current aid programs. Tom Bloodgood questioned whether the application period is closed for the \$5 program. Interested municipalities have an opportunity to come in under the new program. 1999 is the last year for the \$2 aid. Legislative agenda - trying to get 5-2-2 reinstated. What is the deadline for applying for the new \$5 program - 90 days after final roll.

ACTION: Review 1999 application procedure - Frank Ferrari

Geoff Gloak stated that the Board of Assessment Review Training Packets, which consist of the Q&A and Frequently Asked Questions Pamphlets about Annual Reassessment will be shipped out soon. Questions were raised about a new BAR video.

ACTION: Update BAR Video? - Frank Ferrari (*Note: After talking with Kathy Gustafson, Frank reports that EdS has identified this as a priority assignment. They are currently in the process of coordinating the re-filming. They have contacted various vendors to determine the approximate cost. The plan is to have a new video for training in 2001.*)

Tom Frey hasn't seen the Taxpayers and Local Government Officials brochure since January -he asked if the printed one has been changed? Dan responded - yes it has.

Assessors asked for a preview of presentation to be given to Town Clerks.

ACTION: (Matt Beals) Preview Town Clerk conference presentation with RPTAC. - Frank Ferrari - (*Note: Town Clerk's Conference - ORPS will be doing a presentation for new town clerks. Kathy Gustafson will contact Anne Sapienza to let her know what's going on. Also, she will ask Anne for a resource that we can use to review the presentation.*)

Money came from STAR money - there were concerns about aid money. Can unused money, set aside in this year's budget, be encumbered because we are not going to use it. Frank said you cannot encumber that money however, all of the aid money has been used up for 1999-2000.

RPTAC's Mission/Purpose Each Group 5-6 Items

Rick Hubner feels we (RTPAC) should be able to set goals as well as air out issues. We as a group should discuss things that we can look to accomplish in 6-8 months - to a year. Pick issues - develop goals around those issues and look at ways to measure that. Use sticky board method. Next meeting - do in beginning of the next RPTAC meeting.

RPS Processing Fee Schedule

Vince passed out fee schedule for ORPS charges related to processing last June and again at last meeting. Revisions have been based on comments received. Vince explained changes.

Anne Sapienza is concerned that places using our services are unaware of increase. How are we going to get this out? We will distribute through regional offices - actual bill won't go out until late next summer. These changes will be final after this meeting.

ACTION: Publish Fee Schedule in next Survey. - Vince O'Connor

Bank Codes - Put note next to it - Version 4

Teams

Dan passed out list of active/inactive teams. The group reviewed the list one by one and decided on the following:

- 953 and bank codes team: needs a county director. Dorothy Martin will ask Orange County for member.
- Star becomes inactive. Sue Otis questioned whether a change could be made to the STAR form. She would like the yellow highlighting, which discusses proof of residency, to be expanded further.
- County Directors' Roles and Responsibilities was moved to inactive.
- Forestry Valuation Simplification Team - Tom Frey questioned status. Vince O'Connor explained the group disbanded - he will look into it. Dorothy Martin who sat on team explained that there was confusion, disagreement and did not believe a consensus was ever reached. Vince suggested taking a look at it through Valuation team. Tom B. stated that there is not going to be one form for forestry valuation. Anne S. stated that this was brought up at Ag. issues committee and there will be a template. Bill Cinquanti would like to see minutes from that meeting at next RPTAC meeting.

Sue Otis asked where does SalesNet team stand? Dan Curtin talked to Paul Szwedo/Colleen Benson they stated that particular team did its work and has disbanded.

SalesNet - Frank gave overview of where we stand. Currently we have 10 counties using SalesNet, another dozen scheduled for contact and only 3 expressing no interest. Contacts will be made with the remaining counties.

Edye McCarthy has problem with the manner in which ORPS coordinated salesnet demos with counties. She would like to have assessors aware.

Valuation Team - templates are being developed for Agricultural valuation.

ACTION: Publish success of SalesNet - Ferrari - SalesNet and SalesWeb articles appear in this month's Survey.

ACTION: Ask Orange County Director to serve on 953 team. - D. Martin

Next Meeting:

June 15th and 16th
Clarion, Latham, NY

Issues:

- Revisit Advisory Appraisal Rules regarding sharing with assessors and companies
- Reimbursement
- What are the 6-8 issues that need attention in next 6-12 months? Set goals - action steps
- 2000 eq. Rate
- PSG Update
- CTG Report
- Version 4 Update