

**MINUTES**  
**REAL PROPERTY TAX ADMINISTRATION COMMITTEE**  
**Thursday September 7, 2000 1:00 to 5:00 pm and**  
**Friday September 8, 2000 8:30 am to 1:00 pm**  
**Clarion Inn and Suites, Latham NY**

**Facilitator:** Dan Curtin

**Recorder:** Audrey Barnes and Elise Herzog (Thursday) and Lynn Miller (Friday)

**Members Attending:** Tom Frey, Rick Hubner, Edye McCarthy, Doug Barton, Fred Pask, Anne Sapienza, Dorothy Martin, Bill Cinquanti, Tom Bloodgood, Jim Gonyo, Jack Shuttleworth, Tom Griffen, Vince O'Connor, Richard Sinnott

**Others Attending:** JoAnn Whalen, Bill Godell, Dave Williams, Ross Testa, Dan Tompkins, Tom LaRose, Dawn Farrar, Bob Mancuso, Nick Longo, Steve Harrison

**a. Get Organized (Dan Curtin)**

A revised agenda was distributed. Previous minutes were discussed and Bill Cinquanti suggested that on the 2<sup>nd</sup> page, 1<sup>st</sup> paragraph, a clarification needs to be made regarding utility deregulation issue. Dan stated that the RPTAC Action items are posted and have been updated. By end of tomorrow's meeting, several action items will be taken care of.

**b. Leaders' Report -**

**County Directors** - Bill Cinquanti introduced Jim Gonyo who is sitting in for Ron Shetler.

**Assessors** - Tom Frey indicated that this is Doug Barton's first meeting and Edye indicated it is her last. Tom Frey talked about the NYSAA bulletin article Curt Schroeberl wrote and stated that the article was revised several times before being printed. Tom indicated he is the editor of the bulletin and reviews all materials for publication and invites ORPS to take the other side of this issue or any other issue for publication in the NYSAA bulletin.

**ORPS** - Tom Griffen asked about the \$125 registration fee associated with the NYSAA conference and whether the fee is waived for presenters at the conference? Yes the registration is waived for presenters.

**NYenet** - Frank Ferrari

Dan Tompkins from Internet Unit attended a meeting at OFT regarding an update on timetables and connectivity. Handouts from the August 15 presentation by OFT to State Agencies were distributed. Dan indicated it is difficult to give specific information regarding connection of your specific site to the NyeNet.

Pam Lacey is the contact at OFT regarding connectivity. OFT identifies services in two ways, connectivity - what local service and lines are available, and price structure. Currently only state agencies are connected and two county level governments are in the process of being connected - Monroe County and NYC. Dan explained that there are three ways to connect to NyeNet - a direct connection, ride over someone else connection, open method through the Internet.

Rick Hubner asked what advantages it has for him and his municipality - will it be faster? Will SUNY run through this? Dan thinks so, however, there may be private networks. Communication of NyeNet and Monroe County are being set up. Pam Lacey was talking with Ontario County yesterday. Pam has committed to doing a presentation to explain what you need to

do to connect and report the status of who is connected. A meeting has been scheduled to discuss this.

Tom Bloodgood stated that many agencies are on several connections, would using NyeNet replace all those connections? Time frame is uncertain.

Dan stated that VPN stands for virtual private network

**Action - NyeNet status on the ORPS web page on a Monthly basis.**

#37 - add who is on NyeNet on ORPS Internet page -LaRose

**c. FOIL decisions regarding Inventory and Tax Maps**

Information Shared - Rich Sinnott opened the discussion of the federal court decision (i.e. Suffolk v. Experian Information) regarding inventory and tax maps and introduced Steve Harrison to go into further detail. Steve stated that the Suffolk case deals with copyright. Steve also stated that assessment records are public information, legislation that would increase fees for public information has not moved, and that there is no right of access to predecisional materials.

Steve advised that legislation is necessary if government is to be allowed to recover its costs in collecting data, which is then repackaged and sold by private entrepreneurs.

Rick asked if in regard to the data warehouse this is an internal use only issue. Is there any question that this can remain an internal document? Rich stated HK is working on this issue. If we're providing data, analytical tools, etc. . . will John Q Public be allowed to have access to this data? Tommy LaRose stated that this bears a lot of analysis.

Steve stated that FOIL pertains to records, not tools for accessing records.

Rick stated that we have to be able to address membership on this issue and need a comfort level regarding whether or not it is public information or not. Need a sense that it won't be released into the public sector.

Edye indicated that in a data sharing meeting she attended, unless you signed on as primary or secondary data keeper, you don't get access. Tommy LaRose stated that has been challenged.

**Action items - within 3 months -**

**#38 - can we restrict access to the data warehouse? - Sinnott**

**#39 -What are the implications for RPS V4 of OFT's data consortium for GIS data?**

**Why do we ask localities to sign agreement for GIS layers in RPS V4? - Ferrari**

Bill Cinquanti stated his concern regarding a decrease in revenue to local governments when the information is available via data warehouse. Assessors and county directors are aware of the concern and it is not going to go away until we all share in the cost of generating the information.

Anne Sapienza asked has the Governor's office studied the fiscal impact of the data warehouse initiative?

Dan asked if there is an action item from the local perspective to make county and local officials informed.

Jack - is data warehouse available because of non-RPS users. Is the data warehouse available to all assessing units in the state, regardless of whom you are licensed with? ORPS response was by January 1 they hope to have the data warehouse available to those who wanted access.

Tom Bloodgood stated that he suspects the transition will be a gradual one - eventually revenue stream will decline but over time.

Rick stated that when the walls come down (government without walls), will the public be as respective to letting assessors, etc. . . in their homes or will there be resistance?

Anne feels the privacy issue is more of an issue rather than the loss of revenue issue.

This is going on out there, what are we gaining by stalling, if it's going to go, let's help it go the way we want it to. Come up with a way the state can share the cost with towns and counties.

Dan summarized Bill's concern - RPTAC, what steps can we take to implement/support the Governors initiative to e-commerce? (FUTURE RPTAC AGENDA)

Associations/ AOT / NYSAC become active, get involved and work with those (influence) larger organizations. Tom recommended adding a link to CTG via our web site - talks a lot about the fiscal implications, etc. . .

Rick talked about the conflict between the OFT Cooperative vs. the data warehouse.

**d. Annual reassessment –**

**1<sup>st</sup> Phase - 1999 & 2000 Roll Tentative Conclusions**

1999 applications for aid should be submitted and the 2000 applications need to be in by October 1<sup>st</sup>. Most prior year aid payments are out; we've cleaned up the past year's aid reimbursements and are getting back on schedule.

Review of 1999 Annual Reassessment Aid Applications - 21 applications received for 1999, including 6 traditional reassessments for value verification for equalization purposes. Decisions will be made by the end of the year (some in the next couple weeks), payments made by first of the year.

Dave distributed a flowchart and explanation sheet regarding the review process for 1999 annual reassessment aid applications.

In summary, the three things you need to do to qualify for aid;

- 1) need a 6 year Plan,
- 2) documentation on how you got to 100%,
- 3) achieve uniformity at 100%

Anne stated that the plan is a work in progress, if once the plan is submitted, i.e. in the 3<sup>rd</sup> year something looks wrong, will an amendment to the plan be allowed?

The decision making process will be made through the regional offices, the staff who have a feel for what you are doing in your municipality. Edye indicated that not all assessors / county directors have the same working relationship with regional staff as others. If there are no rules and procedures, ORPS needs to make sure all regional staff are on the same page.

**Action item # 40 - Review whether annual aid application can be filed once with plan; or filed with annual report - Harris**

2000 applications - Applications should be submitted to the regional offices, 14 applications received to date.

Discussion took place regarding the tolerance for class D - this is in regard to the uniform percentage and qualifications for aid.

Rick asked at what point would you think this is a successful program? When will you drop back and punt? Tom stated that we would probably have more time to implement this program than originally anticipated.

Rick asked for a status on the number of applications received, total parcel count, approval and denials.

Anne stated that RPTAC should be informed of status regarding all aid administered. (see attached listed)

Bill Cinquanti stated he though the triennial aid was part of annual reassessment, he didn't realize it was different. To qualify for triennial aid you must do a traditional reassessment every three years - a reappraisal of all properties.

Current aid opportunities are Annual Reassessment Aid and Triennial Aid - documentation regarding criteria is available for clarification on the ORPS Internet site.

PSG believes in the philosophy of don't look at the how, look at the end product, performance based.

Tom Frey asked what would be presented at the NYSAA? A overview will be given - 3 hour - overview - better understanding of annual reassessment, similar to Cornell, systematic analysis, etc. . . 6 year plan - more polished than county directors.

## **2<sup>nd</sup> Phase - Training and increasing the level of understanding regarding annual reassessment**

Dave began by stating that there is currently some confusion among ORPS staff regarding annual reassessment. Meetings have been scheduled with regional staff to discuss and clarify information regarding annual reassessment. Also, ORPS will hold concurrent sessions at the NYSAA in Rochester to give assessors more information. Then, meetings with county directors will take place in the regional offices to discuss the nuts and bolts on how and what things to be done. Meetings with assessors, supervisors, chief fiscal officers regarding understanding, commitment and resource needs, as well as rationale approaches and interpretation of the IAAO standards. Anne Sapienza stated that the time frame would probably be past when budgets have been submitted.

Dave stated we need to give more specific skills and understanding for the 2001 places, as well as the 2000 places, to further their knowledge. Even with a 6 year plan submitted, you will need to apply every year. Currently we have some places that submitted for 1999 and haven't for 2000, ORPS will mail reminders. Some counties have been sending e-mail reminders; liaisons with municipalities need to get involved, as opposed to just the state aid rep.

Jim Gonyo stated he has been working with Saranac staff along the way and what they have looks good, his concern is that four months down the road procedures will change, etc. and all will be for naught. Tom stated that ORPS would be providing guidance; there are many ways to implement. The bottom line is are you getting to all parcels assessed uniformly and at 100%?

Tom stated that the same kinds of questions are being asked in regions. Don't look for rules and procedures, learn the IAAO standards.

Tom Bloodgood stated that you need to be involved in the whole process, not only at the end. ORPS should have an idea of what your doing and what it looks like, reliability of your data and what the standards are and how applies to your county.

Anne stressed that IAAO standards are based on county assessing, Dave stated that even a traditional ratio study may not be done, expand outside, draw conclusions, from those conclusions bring valuation back into the town and look at parcels to then evaluate where you are. Anne questions and doesn't feel confident in the flexibility in the staff part to realize if its not broke, don't fix it.

Tom Frey stated that at the last State Board meeting a situation was presented where a municipality did a reassessment but there was a difference in a particular parcel regarding utility generation plant. Because of the difference on the utility plant, the municipality was not considered to have done a reassessment - this was not common sense.

Tom explained that we didn't think it through, Board asked us to revisit, and legislation needs a couple clarifying paragraphs.

Those types of situations scare assessors, and would keep assessors from participating in annual reassessments.

**e. Alliance -**

Anne distributed the revised Guiding Principles booklet. Alliance is working on a proposed charter, which needs to be adopted, then to Executive Board of Assessors for review. Alliance waiting on PSG and CTG final reports. Certiorari booklet is in the process of being published.

Discussion regarding the expansion of the membership took place. PSG recommended that in order to accomplish what we want to do, membership needs to be expanded. Membership is addressed in the charter.

**Other -**

Edye stated that at the previous RPTAC meeting there was a discussion regarding denial of maintenance aid and ORPS was suppose to get list of those places. Where is the list?

A revised RPTAC membership list was distributed, Dan indicated this list will be revised again in the near future.

Reimbursement for assessors and county directors attending the RPTAC meeting should be sent to Dan Curtin directly.

Meeting begins at 8:30 am tomorrow.

**RPTAC Meeting  
Day 2 – September 8, 2000**

Others in Attendance:	Nick Longo	Bob Zandri
	Jim Gonyo	Bruce Sauter
	Tom Bloodgood	Becky Stegman
	Ross Testa	Joe Gerberg
	JoAnn Whalen	Clayton Ash
	Dennis Jersey	Jim O’Keeffe
	Frank Dirolf	Bill Godell

**f. Get Organized**

Dan opened the meeting with discussion of a question raised at the 9/7 meeting concerning 1999 and 2000 annual assessments. He reviewed status of municipalities that have applied and how many applications have been received. JoAnn and Dan generated a list that Dan reviewed (attached).

Following up on a question raised at the 9/7 meeting regarding how many municipalities would have received no aid without new provisions, Frank Ferrari stated that 20 places would have been denied 1998 aid and two did not get aid - 1 class b problem and one class a problem.

Tom Frey asked for list and Frank will provide it.

Tom Bloodgood asked if a any thought had been given to doing away with maintenance aid application process.

Tom Griffen responded that ORPS would have to do the investigations. Vince O’Connor indicated that this would add a lot of work with regard to inventories.

Anne Sapienza feels application process should be kept – it’s not that difficult to apply. Municipalities have to show intent that they want to go forward.

Tom Frey stated that municipalities show intent when plan filed.

Rick Hubner suggested making application part of assessor’s report.

**Action item:** Review whether annual aid application can be filed once with plan; or filed with assessor’s report. (Dick Harris) Discuss at next meeting.

**Next agenda item: Report on maintenance aid review procedures.**

**g. CTG/PSG Activities**

CTG

Dan stated document has been received from printers, addresses requested, but haven't heard back from them. Report should be out shortly. CTG will be doing mailing to RPTAC, Alliance, participants of November workshop etc.

Tom Frey asked if copies could be obtained. Tom Griffen responded that that would be up to CTG.

Dan advised that it could be downloaded from their website

PSG

Tom Griffen stated that Rick was unable to attend today's meeting but that Rick wrote letter to him indicating that everything is currently on schedule. Tom read letter to members.

Bill Cinquanti indicated that when Rick made first presentation folks came out feeling very positive. Felt after second session they came out confused. Directors are concerned that this is plowing ahead and there are very controversial things that they may not get a chance to comment on.

Doug indicated that Directors and Assessors have real concerns about project. He noted a couple of areas they are concerned about that are being ignored. Self-Assessment is one area where Assessors and Directors have indicated that PSG is heading in the wrong direction.

Bill Cinquanti stated that he attended all the focus groups and doesn't recall anyone suggesting self-assessment.

Tom Griffen noted that there will be controversial issues in report and that they will be discussed.

Tom Frey stated that if self-assessing is in report the assessors will not support.

Tom Griffen stated he would not shoot PSG down because they have new ideas.

Edey McCarthy expressed concerns regarding cost of study and what will happen if study is not used.

Tom Bellard stated that a lot has been gleaned going through the exercise. When final report is received it can be reviewed then we can pick and choose things that make sense and don't make sense.

Edey McCarthy feels assessors and directors should be part of the process to pick and choose.

Tom Griffen indicated that report would be reviewed at assessor's conference.

Doug Barton expressed concern with data warehouse and indicated that it is an important issue in assessment community. Information is out there and can be accessed by anyone interested.

Fred Pask asked if ideas in report would be brought back to RPTAC for discussion or will Assessors and Directors be told what they will have to do.

Tom Griffen answered this inquiry in the negative.

Dick Harris indicated most of it would have to be legislatively mandated.

Anne Sapienza asked if copies would be provided to RPTAC when finalized? Tom Griffen stated that report would be shared.

Assessors and Directors are concerned that procedures will be put into place without their knowledge as happened in the past with Rules.

Tom Griffen stated nothing will be implemented without legislation.

In summary, Dan stated that Tom Griffen will take comments back to PSG and advise them of Assessor and Director concerns; will share the report with Alliance, RPTAC, etc., and that ORPS will not proceed without discussion with appropriate parties.

#### **h. Land Values on Assessment Roll**

Rich Sinnott discussed the possibility of proposing an amendment striking requirement that assessor separate land value from total value. Assessors feel it is not necessary for land value to appear on the assessment roll. Rick Hubner stated that it creates confusion but feels it should be made optional. Bill Cinquanti is concerned that removing it will precipitate numerous calls from taxpayers.

Edye McCarthy stated that a taxpayer can't challenge the land value and that the parcel has to be challenged as a whole.

Jack Shuttleworth indicated that he receives many requests from taxpayers for lakefront values on land. Tom Frey stated that is the reason he would like to have land values removed from roll. Rich – cannot challenge land value only if property is improved – have to challenge the total.

Anne Sapienza would like to have land values left on so that they are accessible when taxpayers call with questions regarding land values. Feels if this information is suppressed taxpayers will wonder what assessor is trying to hide.

Rick Hubner, Edye McCarthy and Jack Shuttleworth feel it should be made optional.

Rich Sinnott stated legislative proposals will be put together late next month. Budget or legislature will decide what legislation will be acted on.

Tom Griffen stated the rationale is that it is superfluous and confusing.

Dorothy Martin indicated optional seems to be a bigger headache and she would like to see it gone since it is difficult to explain to taxpayers. Questioned how many other states do just land?

**Action Items #41: How many other states have land and total on assessment roll?  
(J. Dunne)**

**#42: Discuss land value on assessment roll with NYSAA leadership. (T. Frey)**

Tom Bellard stated there are other reasons for land value to be identified – separate for depreciation of building, etc. Feels that there will be more phone calls if not broken out.

Rich Sinnott stressed that the assessing community should push this proposal to the legislature.

He doesn't feel there is a consensus and ORPS shouldn't go forward with legislative proposal until we know what we are putting forward.

Dan asked Anne Sapienza if she would be willing to take this to assessor's group. Anne responded in the affirmative.

Tom Bloodgood stated making land value optional scares him. Indicated County Directors need to have this information available to taxpayers without them having to call assessor and doesn't feel that this is an issue that should be pursued legislatively.

Anne Sapienza feels there should be agreement on sharing market value when locality is assessing at 100%. The same amount appears twice.

Rich Sinnott indicated that it could be taken care of administratively.

Jack Shuttleworth stated that whether there is countywide implementation or not, there is a need to have uniformity throughout the county.

Bill Cinquanti stressed that assessors are not always available to provide answers and taxpayers need to be able to go to County.

Dennis Jersey distributed a copy of tax roll indicating change in location of moving full market value on roll. Indicated he has gotten a positive response from assessing community and that testing would begin today. Stated that code will be released in October.

#### **i. Tax Map Status**

Ross Testa distributed status report and reviewed with group. Ross received a letter from Rick which he read to group. Ross has not received forms from Jeff.

Doug Barton asked whether maps would be certified if signed by someone other than the County Director. Ross responded in the affirmative.

Bill Cinquanti stated that in Chenango County the Assistant Director cannot sign form and the county currently doesn't have a Director. Ross responded that ORPS is only interested in whether maps are maintained.

Rick Hubner stated that the ramifications and remedy is what we should be concerned about. Maps cannot be used if not approved by ORPS. If unapproved maps are use, it does not invalidate the assessment levy. If good map, this is not sufficient reason to not pay your taxes. Possible remedy would be to hold hearings.

Bill Cinquanti feels steps should be taken to decline map based on signature.

Ross Testa stated that ORPS doesn't certify anything and that County Directors are certifying to ORPS that maps are correct.

Tom Griffen indicated possible need to write letter to Assistant Director in Chenango County informing him that he is not authorized to sign map.

Doug Barton questioned whether maintenance aid could be denied to a county without approved tax maps. Tom Griffen indicated that might be possible.

Rick Hubner suggested changing maintenance aid rules. Joe Gerberg responded that tax map compliance is not an assessing unit responsibility and they can't be penalized for something they have no control over.

Ross Tests indicated that rules state that the County Director or Assessor must certify maps.

Jack Shuttleworth stated that maintenance was reviewed in the past.

Anne Sapienza indicated need for Chenango County to appoint qualified Director and that there seems to be a backdoor attempt to appoint Director.

Tom Bloodgood questioned whether there was any teeth in map approval process.

Doug Barton stated that tax maps are becoming the base for GIS and maintenance is very important. Stressed need to find leverage to ensure that maps are accurate.

Tom Griffen stated that the ability to enforce is limited because the legislature wants it that way. Need to ask legislature to do what Assessors and Directors feel should be done.

Jack Shuttleworth indicated that certified maps were tied into maintenance aid.

Tom Griffen responded that ORPS doesn't have the ability to enforce and asked if enforcement is desired, should we discuss it with the legislature?

Bill Cinquanti stated that there is a need to go back to checking that maps are being done correctly.

Dan Curtin asked whether the legislature should be asked to give ORPS authority to review investigate and map compliance. Bill Cinquanti responded that he always thought ORPS had authority.

Tom Frey cautioned to be careful what you ask for – Home Rule

Tom Griffen stated that there is a need to come up with solutions.

Tom Bloodgood indicated maintenance aid should be tied to tax.

Anne Sapienza stated Directors need to get together and come up with a remedy.

Tom Griffen noted that it is important that director be certified but that we have limited authority. Rich Sinnott pointed out that ORPS' authority was removed in the Kerwick decision.

Dan Curtin felt there were no action steps except to send letter to Chenango County.

Tom Griffen added that Directors should go to Association of Towns and NYSAC regarding enforcement remedy.

Rich Sinnott advised that ORPS has no jurisdiction over Rensselaer County legislature which stripped Jeff Jackson of tax map authority. Felt that if a 216 hearing is pursued the defendant will be Jeff. State Board would issue order to Jeff to sign certification and he will not be able to and a judicial proceeding would be pursued to remove him for refusing to take action. Not a desirable outcome.

Discussion continued regarding ORPS' ability to take action in Chenango County to appoint a qualified County Director and the certification of maps by the County Director.

Dan Curtin suggested an ad hoc committee to come up with a remedy/action steps and asked if each group could meet to come up with remedy.

Doug Barton stated he would talk with people and pursue ideas before setting up a committee - not sure Assessors have by-in.

**Action item #43: Notify Chenango County that tax map maintenance form is incorrectly signed, notify appointing agency**

**Action Item #44: Pursue ideas to find appropriate enforcement/compliance mechanisms (D. Barton) Tom Griffen volunteered to go with Doug to meet with interested parties.**

Ross Testa touched briefly on need for aid for digital conversion and reviewed digital tax map conversion projects. He indicated that many counties don't have revenue to digitize.

#### **j. Utility Issues**

Vince O'Connor stated that utility report on the Valuation of Electric Generating Properties is out on website. Vince will get paper copies out if not accessible on the web.

The Depreciation Study is progressing. We asked Dr. White to present us with more information as well as options to consider. We are asking for alternatives in the area of depreciation to arrive at defensible and accurate special franchise values. We have a year to go before it has to be in place in our valuation systems. Will share it as information becomes available. Now it is a work in progress.

Vince stated that SAS was asked to follow up on 3 action items.

1. Training - we sent a memo on this with RPTAC agenda. One session was held in Batavia with about 70 people in attendance. The sessions are scheduled for the Southern, Central and Metro regions, and still need to be scheduled in the North.
2. There is an ongoing effort to develop a training course for utility appraisal. Staff from ORPS, assessors and utility companies are working on this. Vince distributed draft of Commercial, Industrial and Utility Advisory Appraisal Defense Policy. Vince asked for comments from RPTAC (to date, none have been received).
3. The advisory appraisal process is in progress for the 2001 assessment cycle. Utility Company Assessment Roll Standardization (UCARS) have been completed in 232 cities and towns, SAS is presently working with 54 municipalities, and County Real Property Tax Service Offices are working with 148. This leaves 560 still to be done.

Tom Frey asked whether there would be vast swings in value with regard to recent Newburgh sale of generating facilities. Vince indicated that staff is trying to get information on the sale to see if the purchase price is only for real property or if it also contained money for other non-real property items.

Frank Dirolf briefly discussed ORPS' electric generation valuation process. He also explained that it was premature to evaluate the impact of the Newburgh sale on the valuation of those facilities.

Concern was expressed regarding ORPS' valuation methodology for generating plants.

**k. 2001 Railroad Ceilings**

Jim O'Keeffe noted that Governor stated last January that position of Administration is that railroad taxes are too high – initial bill would cut railroad taxes in half. A later bill emerged which left saving to railroads in place but bill would cut railroad taxes but would hold harmless municipalities for first two years. Both bills contain the same changes in computing railroad ceilings. Ceilings are established by ORPS to limit values on which taxes are levied but come under home rule. Local assessors still need to assess property. Up until this coming January railroad ceilings on property owned by old Conrail are subject to court order – order will expire ceiling values for Conrail property will increase by at least 50%. If Governor's program is passed, that will change way ceilings computed and put ceilings below 2000 levels. Need to point out to assessors that they don't just copy last year's ceilings. If legislation is not passed, ceilings will go up considerably next year.

Rich Sinnott noted that there is a need to get the word out that ceilings may be in flux.

Rick Hubner asked for confirmation of village question. Jim indicated that settlement will not sunset for villages this year.

Tom Frey asked if Jim could get material together for article in Assessors' Bulletin.

**I. Real Property Transfer Forms (5217)**

STAR - primary residence

Bill C. presented for Ron Shetler. Ron suggested changing 5217 to indicate whether property is or will be a primary residence.

Tom Griffen responded that assessor is to be notified when property use changes. Could simply ask question whether property is primary residence.

Bob Zandri indicated this issue was pursued by STAR group. He noted that new homeowners may forget to apply or information is received after taxable status date.

Joe Gerberg – suggestion did not go forward until reporting problems corrected. Electronic filing of 5217 could serve as filing for STAR. Tom Frey expressed concerns about making STAR application process so automatic.

Joe Gerberg noted that assessors still have responsibility to verify whether a primary residence. Joe also noted that schools will have to indicate what budgets will do to STAR exemption savings.

Reporting of Subdivisions

Discussed the fact that boxes on 5217 are being incorrectly checked and what can be done to correct this situation. It was noted that it is up to the County Clerk to verify that the form is completed properly. Jim O'Keeffe expressed a need for better communication between county and town.

Joe Gerberg stated that it is the assessor's responsibility to assess property including defining parcel.

### **m. Action Items**

Dan noted that members had moved through a good number of items at this meeting.

With regard to aid notification item, Anne Sapienza discussed this with Sally and it was determined that there is no way of knowing when the Comptroller sends out checks..

Dan stated that he would update items in the next week or so and put on web board.

Frank Ferrari updated group on SPSS and distributed SPSS pricing schedule. Frank reviewed costs to purchase as opposed to using ORPS' link to SPSS.

Anne Sapienza indicated that she received SPSS material that could be purchased for \$400 for stand-alone and that a representative for the company would be attending Assessors' Association conference.

Frank Ferrari asked to receive copy of material noting that it may not be entire package that they are offering for \$400.

Bill Cinquanti asked whether training will be provided if SPSS purchased. Tom Griffen answered in the affirmative.

#### **Action Item # 45: Follow-up on SPSS price differences.**

### **n. Current Issues**

Rick Hubner expressed concerns regarding the equalization process and changes in trending. Feels Assessors and Supervisors need documentation that give them a clear understanding of mechanics of process.

#### **Action Item #46: Prepare equalization material that explains trending aggregates and discusses current methodology. (F. Ferrari, etc.)**

Tom Bloodgood expressed concerns regarding reasons for denial of maintenance aid and notification process. He stated that Assessors look bad when Supervisors get notification that assessor reports not timely filed.

Tom Griffen indicated that ORPS should try to improve process and that all factors need to be considered when granting aid.

Tom Frey stated that he received same letter and was not happy that his Supervisor received letter.

Tom Griffen indicated the need to change letter to take "sting" out.

#### **Action Item #47: Examine aid denial letters to soften non-compliance on non-substantial items; sales, assessors' reports; inventory. (Dick Harris)**

### **o. Next Meeting**

December 14 &15, 2000  
Clarion Inn

## **Agenda Items**

What steps can we take to implement/support governor's e-commerce initiative  
Report on maintenance aid review procedures.  
Electronic communications.

1999 APPLICATIONS

County	Municipality	Parcels
Delaware	Franklin*	2000
Saratoga	Malta*(A)	±5000
	Milton	±5000
Washington	Kingsbury*(A)	
Tompkins		31,000
Onondaga	Manlius	13,000
Schulyer	"CAP"	2,000
Cayuga	Sterling	2,000
Oswego	Fulton	4,000
Jefferson	Watertown	8,000
Genesee	Bergen*	1,300
	Byron*	1,100
Wayne	Macedon	3,500
	Palmyra	2,700
	Walworth	3,400
	Williamson*	3,000
	Ontario*	3,600
Chautauqua	"CAP"*(A)	12,000
Erie	Clarence*(A)	10,000
Steuben	Corning	4,000
New York City*A		936,000

\*Filed for 2000

(A)Value Verification Done

2000 APPLICATIONS

County	Municipality
Westchester	Pelham
Hamilton	Inlet
Wayne	Rose