

Training Governance Team Minutes

March 22, 2006

Present: Jeff Bartholomew, Cathy Conklin, Sally Cooney, Tom Frey, David Jackson, Cyndy Knox (Facilitator), Eugene Monaco

Resources: Karen Barrett, Jim O’Keeffe, Maureen Wetter

Recorder: Joan Wiech

Absent: Nelson Bills, Tom Bloodgood, Suzette Booy, David Briggs, John Zukowski

Rules Review:

New York City - SUBPART 188-8: The NYC rules remain in draft format awaiting GORR approval. At the March State Board meeting, the Board decided to put “emergency” rules for NYC on the April Board agenda. If the State Board approves these on April 28, the emergency rules will be in place for 90 days.

There was a concern expressed about certification of an assessor who is certified in a town - and is later appointed Assessor in NYC. Since NYC has a separate certification requirement, the assessor’s certification would not crossover. The person will first have to meet NYC civil service requirements and then the training record would have to be reviewed by ORPS.

The group also discussed what the “timeframe to become certified” will be for future NYC assessors (beginning office after 4/01/2008). Some thought that they would get two years to get certified - but draft rules do not specify. The following comment was not part of the discussion, **but is being added as a correction for the minutes:**

- The current law does not provide interim certification for NYC assessors (being in office while not certified). Therefore, unless an amendment is passed to allow interim certification, NYC assessors will be required to be certified before appointment to office.

NYC Finance Dept is in the process of setting up training for their Assessors in May - IAAO Courses 101 and 102 were approved by ORPS. ORPS will prepare a list each year of those who require training and review it with the City. Discussions with the City about a comprehensive exam have not occurred. City assessors who possess designations listed in the law may request a waiver of the basic course of training. The City or the individual should send a request in writing to ORPS and include a copy of the certificate.

Assessors – SUBPART 188-2: The team reviewed and discussed the first draft of the rules:

- 188-2.1(c) needs to be more clear.
- Rewrite 188-2.1(g) include the Residential Appraiser certification? Discussion on what courses should count for certification if they are more than 3 years old. Assessment Admin training needs to be current. It was discussed that requiring local staff and appraisers to re-take courses more than 3 years old may be too strict. Some think people who are in office doing the job shouldn’t be expected

to repeat basic training taken in the past; others think that all training more than 3 years old should be repeated when a new assessor takes office. Agreement was that Assessment Administration should be repeated if over 3 years old.

A short discussion regarding the requirement of the Farm course for certain assessors began during the discussion of the County Director rules. Jeff Bartholomew objects to this requirement.

- 188-2.6 (b) (2) delete major property types from data collection description
- 188-2.7 cleanup

County Director – SUBPART 188-4 The team reviewed and discussed the first draft of the rules:

- 188-4.1 make changes to match changes in 188-2.
- There was a discussion about the necessity of retaining Section 188-4.3 of rules - Classification of the office of County Director. The classifications were established long ago, and were based on the number of parcels in a county and used to determine the minimum qualification requirements (188-4.4). The discussion was centered on whether we should simplify 3 classifications to one - or leave it alone. There was discussion on the merits of using the highest, middle or lowest number of years experience required. It was decided that Sally will bring this idea to ORPS management for input.
- The team also discussed the necessity of an elective: (Farm Appraisal or Forest Appraisal) for the County Director certification – just one county will be affected; all others require Farm – based on the criteria established for assessors. The best way to approach this would be to have the same certification requirement for all county directors, even Hamilton County.

Decision: Remove the elective certification requirement from draft rules. Hamilton County Director has same certification requirements as all County Directors – meaning all the directors will be required to take Farm.

Ethics in New Program

The team discussed the need to begin work on KSA's for the Ethics component. There was a question as to whether the Assessment Administration course will be reduced to nine days by taking out the Ethics component. As work on the KSA's are done on the Ethics component it will be necessary to look at the Assessment Administration KSA's which will help answer this question. Once the KSA's for the Ethics component are completed the course will have to be added to the mix of the course development work. A team was formed to work on the KSA's that includes David Jackson, Tom Frey, Jim O'Keeffe and Cyndy Knox. Cyndy will coordinate. The understanding is that the Ethics course will be available in both classroom and on-line versions.

ORPS Course Development Work

Course development should continue as planned now that the vacant position in EDS has been temporarily filled. Hopefully, the position will be posted and filled permanently in the near future. The SUNY IT Summer Training Conference will be coordinated by Nola King this year. A RPA Trainee will start in April (3 month rotation) to assist in course development and other duties. The Mass Appraisal and Forest Appraisal courses will be developed by regional staff. The course development for Mass Appraisal will begin as planned but the Forest Appraisal course development may be postponed until 2008. The team agreed that this is not a critical issue. KSA's for both courses are still planned for this summer.

Everyone reviewed and accepted the final KSA's for Farm Appraisal and Commercial/Industrial Valuation that Cyndy distributed and course development will begin. The development of the Data Collection course is currently in progress. It is expected to be completed in June 2006. It was noted that Dave Shanley is on the team and he should be aware of the recent changes that need to be addressed in the course. If anyone has pictures that may be appropriate for this course, please send them to Cyndy.

Assessor Orientation is in the process of being developed with the assistance of the RPA trainee. The plan is to have it available on the new LCMS 24/7. The course will be set-up with links that can be printed or the County Director can review them online with the student.

The Assessment Administration course development is in progress. This course has a year to be completed. As coursework is being developed an exam question bank is being developed for potential use in a comprehensive exam. One possibility is to develop pools of questions and offer the exam on the computer at the regional offices. Questions could be randomly pulled from the different pools to make up an exam. Therefore, a different exam will be offered each time. There is no official plan to complete development of a comprehensive exam but ORPS is working on plans for the future possibility.

NYSAA Course Development Work

Cost, Income and Market Approches to Value Course

The Cost, Income and Market Approach to Value course has not been started but a detailed outline should be available by the next Training Governance meeting in June.

Training Status/News/Misc. Topics

ORPS: SUNY IT is scheduled for August 6 – 11, 2006. Courses are being scheduled and plans are moving forward. New this year, there will be an "ORPS Meet & Greet" session to give students an opportunity to meet some of ORPS staff and ask questions. AOT went well, 95 attended.

County Directors: Working on plans for the summer conference.

Assessors: The Assessors' Association is set to go with R-1, R-2, G-1 courses scheduled for SUNY IT this summer. R-1 and R-2 planned for Ithaca in March were canceled. G-1 will be held March 27-31 with 8 enrolled. Forty to fifty letters were sent to those who required the training. Cornell is tentatively set and is on the website. They are still waiting for descriptions of some courses. Most of the instructors are set, still waiting on a possible instructor from ORPS. Conferences are set and one-day seminars are going well.

A discussion followed regarding the policy to request ORPS instructors. The policy that has been in place and continues to be in place is that if an organization would like ORPS staff to be an instructor for a course, they should send a written request (e-mail is fine) so that ORPS management can decide whether staff is available at the time. The request should be sent to Sally Cooney and include details and time frame.

A concern was expressed that a report on progress of the Training Governance Group was distributed at a RPTAC meeting, without first sending to the Governance Team for input prior to the RPTAC meeting. Decision: A copy of the report will be sent to team members as well as any other future reports.

Agenda Items:

Finalize Rules

Detailed Outline (Cost, Income and Market Approches to Value)

Update on course development

Update on Ethic's KSA's

Action Items:

Revisions to Rules (Assessor, County Director, NYC Assessors)

Check with management about the Classifications for County Directors

Send letter to NYC informing them about adopting emergency rules and invite NYC to next TGG meeting

Supply a copy of the report that was submitted to RPTAC to the team – done 3/23

Coordinate Ethics group meeting

Next Meeting:

June 1, 2006

Newburgh/Syracuse

Time – 10am-2pm depending on the agenda