

Training Governance Minutes - June 8, 2005

Present: Jeff Bartholomew, Suzette Booy, Sally Cooney, Tom Frey, David Jackson, Cyndy Knox (Facilitator)

Syracuse: Tom Bloodgood

Additional Resources: Maureen Wetter

Recorder: Joan Wiech

Absent: Nelson Bills, David Briggs, Cathy Conklin, Eugene Monaco, John Zukowski

The first round of appointment terms have expired for the Training Governance Group. The members were appointed to 3 year terms. Each group had one member requiring reappointment.

The following team members were reappointed with terms to end April 2008:

Cathy Conklin

Sally Cooney

John Zukowski

The County Directors are waiting for the new president to confirm the reappointment of Suzette.

Program Overview

Jeff handed out and explained the objectives in the document that was used to present the 2007 Training Program to management. One issue that management was concerned with was the increase in the total number of training days required for certification. Management has asked for continuous updates about this program.

There was a side discussion about the new program and how the 10-days of training would be handled. The concern was that most assessors would find it a burden to take 10 continuous days of training in either Assessment Administration or Valuation because of work obligations. It was suggested that modular training be an option. Possible problems with this type of training would be keeping track of the modules on the EDS System and an increase in travel expense/reimbursement. Other alternatives would be one-day seminars, on-line training and pre-work manuals. This issue will be handled during the course development stage.

The next document that Jeff handed out was The Cost of Delivering the Current Program versus the Projected Cost of Delivering the Proposed Program. It was noted that the times were approximate, based on research by Jeff and the tracking system used by ORPS staff. The times included both preparation and teaching. Instructors who have taught the course several times do not need as much prep time as instructors who are new at teaching the course. The prep time costs seemed to be inflated but since the courses are new/revised it seems reasonable that an increase in prep time will be necessary. There is a chart for both Basic Certification and Continuing Education. It was stated that management should be aware that preparing and instructing continuing education courses “moves the agency’s initiative forward.” We will need to pay for outside instructors if

we do not want to increase the ORPS staff training hours/days. It was also noted that the New York City training requirement and reimbursement has not been included in this document.

Data Management Course

The members thought the topics to be covered may already be covered in other courses. If this is the case this course may be unnecessary. In some courses a topic may only be covered briefly where more in depth coverage is required. Local assessors have a need to understand the ORPS process. The members decided to wait until the other courses have been completed to see where they overlap and if all the objectives envisioned for the Data Management course have been addressed. It is important to advise the other course curriculum teams and maybe supply them with a comprehensive list so they can keep this in mind as they work on the courses. Also, this should be reflected in the course development schedule.

Decision: The team agreed that we would save this course until the others have been completed and see if we have covered all the objectives that we envision for the Data Management Course in the other courses. Later in the meeting, we realized that this might be a stumbling block for the rules process.

Assessment Administration Course

Cyndy received two completed critique sheets. She stated that the information on the sheets is valuable in writing the course and she appreciates the input. She has started working on the course and will pass it on to ORPS staff first and then on to the team.

Data Collection Course

The KSA's are complete and Cyndy will e-mail the critique sheets to the team. She would like them returned to her in about 3 weeks. The issue regarding whether income and expense information should be on the commercial card was brought up. The issue was referred to the State Valuation Services unit.

Valuation Course

The Valuation group recently met in Newburgh. The NYSAA has some old course materials that are a good starting point for a new valuation course. Tom Frey stated that the trustees will want to retain ownership and they plan to have a meeting soon to discuss the courses. This meeting is expected to confirm that NYSAA will develop and deliver this training component. The group decided not to do critique sheets for this course.

In January of 2008 the training requirement to get appraisal licensing will increase. It is expected that the number of hours of required training will double so the R-1, R-2, and G-1 courses will probably go from 3 weeks of training to about 6-7 weeks of training. This increase will not be required for basic certification for assessors so the agency will have to make decisions about some issues involving an increase in the courses – limits, costs and reimbursement. There is more information about this on the Appraisal Foundation website. www.appraisalfoundation.org

Assessor Orientation

Jeff handed out a document outlining a new Assessor Orientation program. The County Directors felt that orientation training is vital for new assessors and should be offered soon after a new person takes office. During the Orientation training session, Directors will be able to inform new assessors about where and how they can get the resources they will need to do their job. This can be done by using various resources such as websites, hard copy/manuals and phone numbers of individuals who can assist them. It was noted that the new LCMS would also be a valuable resource for assessors.

Assessor Orientation is a required component of the current basic training program for assessors. However, if an assessor takes Assessment Administration prior to taking Orientation, the orientation component of the training program is waived. Since rules must be changed for the new program, team members felt this might be a good time to rethink this policy. The general feeling of the group was that Orientation should be a required course regardless of whether the assessor has taken Assessment Administration. Orientation should also be the first course taken by an assessor if at all possible.

Disadvantages/potential problems – enforcement for missing a half-day Orientation seminar – should ORPS hold hearings for those who do not attend? Will all of the directors offer Orientation?

The County Directors feel that it will NOT be a problem for directors to do the Orientation training in the appropriate time frame. They also feel that Assessment Administration does not offer all that a new assessor needs to know and that too much time may go by until they have completed Assessment Administration.

Another suggestion was to make reimbursement contingent upon completion of a ½ day Orientation class, but administering/mandating/enforcing this may be a stumbling block. It was suggested that we require Orientation for all new assessors and wait and see if it becomes a problem to enforce.

Decision: The team agreed to add orientation to the new training program as a requirement for all new assessors. Continuing education credit is not available for this component. Jeff will continue to work on the course development.

Action Item: The Directors will discuss this change at their conference.

Next Batch of Courses

A plan was handed out for the upcoming course review/development. The Data Management course was placed on hold and moved to the end of the schedule. It was discussed that when we work on the KSA's for the Farm Appraisal course we may find that it changes from 5 days to 3 days. Everyone agreed that the ½ day road trip is a good idea and should remain in the course. Mark Twentymen should be able to let us know who should be involved in this course development.

The Commercial /Industrial Valuation is required for County Directors. It was suggested that John Zukowski, Tom Frey and David Briggs might want to be involved in this course. This may also be an opportunity for New York City to get involved. Also, SVS may have an interest. The IAAO Industrial Course may be equivalent but it is not offered often and it is more expensive. Other possible options are using textbooks with our course and our exam and possible module classes. There are a lot of possibilities for this course and the KSA Team will work on determining the best options.

KSA's will be done for Tax Mapping and Tax Collection Enforcement in the future.

Decision: Assessors, County Directors and ORPS will go to their groups to find appropriate representatives for the Farm Appraisal and Commercial/Industrial KSA teams.

Training/Status/News

ORPS: Learning Content Management System update – ORPS is going to bid on a new LCMS. The RFP is expected to go out the end of June with an August bid opening.

Rules update – Legislation establishing training and certification requirements for assessors and appraisal personnel in New York City passed both houses. ORPS is planning to propose rules to implement NYC legislation along with rules for the new 2007 program at the same time - September.

We have been receiving registration forms for SUNY/Utica Summer Training.

Directors: County Directors Conference schedule is set. August 1 – 3, 2005. The Fundamentals of Tax Mapping course will be offered. Tax Collection and Enforcement will be offered in the Fall/2005.

Assessors: R-1 and G-1 were offered in Ithaca in April 2005. Cornell is all set. The fall conference is close to being finalized. John Zukowski will be teaching Instructor Training and the class is full.

Action Items:

Advise the other sub-groups to keep in mind the Data Management objectives as they work on the KSA's for the other courses.

Cyndy will e-mail critique sheets for Data Collection to the team

Select KSA Teams for Farm Appraisal & Commercial/Industrial Valuation

Revise curriculum development schedule

The Directors will discuss the change in Orientation at their conference.

Next Meeting: August 31, 2005 - Syracuse and Newburgh - (10:00 – 3:00)