

Training Governance Team Minutes

June 7, 2007 – Albany & Syracuse video conference

Present: Jeff Bartholomew (Facilitator), Suzette Booy, David Briggs, Cathy Conklin, Tom Frey, David Jackson, Cyndy Knox, Eugene Monaco

Additional Resources: Phil Hawver, Jim O'Keeffe, Maureen Wetter

Recorder: Joan Wiech

Absent: Nelson Bills, Sally Cooney, Joe Maciejewski, John Zukowski

Introductions

Minutes from last meeting have been posted to the website.

NYC Training Program

Course 101 & 102 were offered in May to New York City assessors. ORPS has scheduled the Mass Appraisal and Advanced Income courses to be held in New York City in June and July 2007. There are about 140 assessors required to complete this training. Additionally, in July, Alan Goodman will be conducting two sessions of the Ethics course. Mr. Goodman is a former New York City policeman and has trained a multitude of government employees about ethics. Training classes will not be scheduled for September through January 2008 due to the increased workload of New York City assessors.

The team discussed the necessity of developing our own Ethics course. Some members felt we may be able to use courses and instructors, such as Alan Goodman, to provide the training for all assessors. The group decided that it would be beneficial to develop an Ethics course to ensure there were ample opportunities for the student to take the class within the required timeframe.

Decision: NYSAA agreed to develop an Ethics course for assessor training as planned.

Assessor and County Director Rules

GORR has released rules and the Albany Hearing for Public Comment is scheduled for June 7, 2007 at the Office of Real Property Services. Hearings for Public Comment have also been scheduled for Newburgh - June 8, Syracuse - June 25 and Batavia - June 26, 2007.

Training Appropriation/Fiscal

A report of the 3 Year History of Upstate Assessor/County Director Training Reimbursement was handed out to the team members. The report projected an estimated decrease in rollover funds due to the increased spending of the previous year's funds. Research indicated that expenses increased in 2006 in many areas, with large increases in:

Lodging

Increase in attendance at training sessions, means more reimbursement paid

NYSAA Fall Conference in Lake Placid

County Director Summer Conference in Lake Placid

This projection indicates that future funds may not be sufficient and the Local Assistance Fund is overcommitted. Another concern was Assessor and County Director training costs may increase in 2007/2008 as new assessors take office and the new Training Program requirements begin.

There was a discussion concerning why the New York City Assessors and upstate New York assessors are both approved for \$350,000 in funding. Some members felt this appropriation of funds isn't fair because there are more than 700 assessors in upstate New York with a basic and continuing education requirement and only about 150 assessors in New York City with a basic

training requirement. The Division of Budget approves all spending plans. As assessors in New York City become certified and the training requirement decreases, the plan/amount that is approved by the Division of Budget will most likely reflect this. In response to a question as to whether funds appropriated for NYC that are not used could be used for upstate assessors, all payments must be made pursuant to the approved plan.

The assessors also had concerns about the issues regarding payment and reimbursement for training classes taken by assessors. The upstate New York assessors are required to pay for their training and then submit a voucher and wait for reimbursement. The New York City assessors are not required to follow this policy. Some members feel this should be addressed as soon as possible. They also would like details of training costs, per student, for New York City assessors before the next meeting.

ORPS Staff as Instructors

A questionnaire/survey was recently sent to ORPS Albany and Regional staff seeking interest in becoming a part time dedicated instructor. Mark Grimm, an instructor from Grimm Communications, has been hired to hold two Instructor Training Classes in Albany and Syracuse. There are ten ORPS staff from each region enrolled. Regional Managers selected staff based on the responses to the questionnaire/survey and their availability.

When selecting instructors for a course, it was noted that an instructor's knowledge of the course material is very important. It is also important for new instructors to be placed with experienced instructors when they begin. EDS does not initially approve new instructors but they do rely on feedback from training classes held. Regional Managers are also informed about feedback on their instructors and this information has been used in the evaluation by ORPS of instructors. It has also been noted and taken into consideration that curriculum design is important. By addressing these issues and following this course of action, EDS hopes that the quality of training will improve.

ORPS Participation in NYSAAC Programs

It was stated that the main reason for the formation of the Training Governance Group was to provide a better basic course of training for Assessors and County Directors. The predecessor group agreed that the DOS valuation courses are inadequate for basic assessor training and that program was given to the Governance Group to implement. There was a question from the group regarding ORPS commitment to a new valuation course. ORPS responded that it will stand by a new valuation course but does not have the resources to develop or instruct the new course. ORPS will also have a list of courses that are equivalents.

Training/Status/News/Misc. Topics

Directors:

- Summer Conference is planned
- Ethics course is scheduled.

Assessors:

- Farm was canceled at Cornell.
- Cornell enrollments are low, 2007 reappointment year may be the problem
- There are many one day seminars scheduled and the enrollments are very good (we believe that asking for topic suggestions at last year's conference and incorporating them into this year's schedule has increased enrollment)
- Fall Conference program is set – topics are tentative

ORPS:

- The LCMS system is live and operational, access is assigned as a student enrolls.
- Orientation is available on LCMS for County Directors to use - they can enter through the Assessment Community on ORPS website and use the materials as a tool when conducting an orientation session with assessors.
- The LCMS cost is a per student license fee and an annual maintenance fee which is a percentage of the license fee. Once they enroll in training they continue to have access to the system until they are no longer an assessor.
- Summer training enrollment at Utica is going well.
- Data Collection, Mass Appraisal & Effective Public Relations are low at Utica.
- The computer courses at Utica are doing well, and we hope to add extra courses as the rooms become available. (update: there will be two offerings of each)
- There is a new two day course at Utica – Advanced Report Writing and Using the ORPS Internet Site
- Excel for Assessors is also offered at Utica.
- The contract cost for SUNY Utica is not paid out of the \$ 350,000 local assistance fund
- A copy of the reminder letter that is being sent to all uncertified Assessors and County Directors (about 100) was handed out to team members. In addition to reminding them about their certification requirement, it also informs them about the Assessor and County Director Program changes beginning in October 2007.
- EDS staff is working on the computer system changes needed for the new Assessor and County Director Training Program – the system work will not be completed by October 2007.

Course Development Process

The following steps of the Course Development Process were explained and discussed:

1. KSA's are developed by the KSA Team
2. Developers examine the KSA's and put it into a course format, which includes student manuals, instruction guides, presentation materials
3. EDS, regional staff and content owners review the course content for accuracy
4. The first classes are presented to ORPS staff, regional and Albany as "dry runs" and feedback is collected and courses are adjusted.
5. The courses are scheduled and presented to Assessors, County Directors and their staff (some adjustments can still be made if necessary after this step)
6. Each of the courses has an annual review.

The team had an additional discussion about what courses should have an exam requirement. As of now the courses that have an exam requirement are Mass Appraisal, Assessment Administration and Data Collection. The members agreed that the Valuation course should have an exam. They also agreed it is not necessary for the Ethics course to require an exam. Concerning exams, some team members feel as though the requirement to pass the exam to be reimbursed for training costs is unfair. They feel it shouldn't be handled this way because it puts unnecessary pressure on the assessor. This topic will need further discussion.

Curriculum Development

Assessment Administration – Cyndy and Sean are working on the course development, it is behind schedule but they expect completion by December.

Data Collection – completed and the course has been held.

Commercial/Industrial Valuation – Cyndy and John Zukowski are beginning to work on course equivalents. ORPS will be asking for help from CVSU

Assessor Orientation – available on LCMS for County Director use

Mass Appraisal – is moving along

Cost, Income and Market Approaches to Value – (NYSAA developing) - outline has been reviewed. The plan is to have it set up as two separate thirty hour sessions, one week each, (Part I & Part 2). The weeks will not be consecutive. Another idea that is being pursued is having the course set up in modules. The course is moving forward.

Farm Appraisal – this course is moving along as planned.

Ethics – (NYSAA developing) - information has been collected – moving along

Forest Appraisal – Since the Forest Appraisal course has been postponed there was a question as to why a Valuation Program for Forest Appraisal on the RPS system has been developed. The answer was that it was developed mainly to get the Saranac Forest Unit off the mainframe and not as a benefit to the local assessors, etc.

It was discussed and agreed that a new Forest Appraisal course is still necessary and that the methodology issues are the main concern. ORPS and the assessors need to work together on the valuation of forest properties. It was agreed that before the KSA's can be determined the methodology issues need to be resolved. Then the KSA's can be determined based on those decisions. It may be possible to get input from RPTAC Valuation Team/RPTAC Forest Subcommittee.

Tax Mapping, Tax Collection & Enforcement – KSA's are about 85 % complete – all of this work has been completed though e-mail by David Jackson, George Michaud, Kathy Myers, Frank Algozzine, Joe Maciejewski, Joe Gerberg, Jane Powers and Paul Burckard and other Sullivan County staff.

The New Program Course Development Status Report that was requested at the last meeting has been prepared and was handed out to the members.

ACTION ITEMS

Fiscal report on New York City training

Invite NYC to next Training Governance meeting

AGENDA ITEMS:

Fiscal Crisis – 2008 – future

Update Development of Courses

NYC – Fiscal

NYC Training – Assessment Administration

Rules

NEXT MEETING:

October 18, 2007

Albany / Syracuse

10:00 AM – 2:00 PM