

Training Advisory Group Meeting September 20, 2010 – Video Conference – Albany and Batavia

Present: Christine Bannister, Shirley Bement, Cathy Conklin, Nathan Gabbert, Gene Monaco, Paul Szwedo, Maureen Wetter (Facilitator), John Zukowski

Others Attending: Philip Hembdt

Recorder: Joan Wiech

Absent: Suzette Booy, David Briggs, Steve Harris

Minutes from the March 3, 2010 meeting have been posted to the website.

Proposed Rules

A sub-group consisting of Cathy Conklin, Shirley Bement, Jim O’Keeffe, Sally Cooney and Maureen Wetter met and decided to add the high school diploma requirement to the minimum qualification standards for both Assessors and County Directors. The group discussed this and agreed with the addition. The group also agreed the proposed rules are acceptable but thought it was necessary to have further discussion on the Apprenticeship Program before they are submitted.

It is expected that implementation of the program will be 2013. Once they are submitted it may take as long as nine months to completely go through the rules approval process.

Apprenticeship Program

The Apprenticeship program was developed as a result of discussions about the expected vacancies in Assessor and County Director positions throughout the state. The concern is the lack of qualified candidates to fill the positions, especially since there isn’t a structured program available for training County Directors.

Along with raising the bar on minimum qualifications the group thought this program would provide a process to get a qualified person groomed to step into the job and continue to take training once appointed.

To review and approve this program Counsel’s office will require a detailed outline/documentation of the procedures for this program. The group agreed that a sub-group should be formed to discuss the issues and write a report/ outline to present to the group for discussion at the next meeting.

One issue that should be considered by the sub-group is whether “part-time” work/experience can be equivalent to 3 years of full-time practical experience. This needs to be considered because some municipalities may only have part-time positions. This will extend the number of years it may take an individual to get the required experience. It was mentioned that Educational Services does accept part-time experience when reviewing minimum qualifications for assessors as long as the experience meets the criteria.

Another issue was wording in draft rules about past experience being acceptable as satisfying the Apprenticeship Program.

The group discussed a mentoring program that could groom an assessor / county director for a particular municipality. They would not only get the skills and experience of the position but the background of the municipality.

Someone will have to keep track of the progress of an individual. A checklist might be a good idea. Some individuals may move more quickly through this process than others.

Smaller municipalities may have a problem with this as they may only have a part-time assessor in the office. Designations will also need to be considered. Some designations don't necessarily mean an assessor has the experience to do the job.

It was mentioned that there may be only a few interested in this program so we may not want to spend too much time developing it.

Procedures and guidelines are necessary to administer any program. There are several tools that can be helpful in establishing some guidelines for this program. A good starting point is the "Assessors Calendar". It was suggested that this can be used to list all the duties of the County Director that pertain to the cycle that the assessor follows. The Assessment Administration course has a chapter on the "Role of the Assessor" which may be helpful. A pamphlet titled, "Year in a Glance" Guidelines for an Assessor may also be useful. And there is a section of the IAO-1 class that covers the assessor's role and may be useful.

The group agreed to form a sub-group to compile this information and prepare a report to present to the group at the next meeting before any final decisions are made. Shirley will discuss the program with the County Directors to get their recommendations. Cathy will discuss it with assessors to get a volunteer to serve on the subgroup.

New York City Update

The Department of Finance has 114 certified assessors. The IAAO Course 311 Residential Modeling was offered as an equivalent course last week in the City so that the remaining few assessors who need one last class could attend and become certified. Union Local 1757 sponsored the class.

The Tax Commission and Law Department have 5 certified assessors and 8 uncertified assessors. The IAAO Course 300 Fund of Mass Appraisal is scheduled for the last week in October in the City. The Tax Commission and Law Department are working on creating an administrative law review and assessment proceedings course that would substitute for the Commercial/Industrial Modeling requirement.

A question was asked as to whether there is a program in place for newly appointed assessors in New York City as new assessors are hired. At this point, there hasn't been any work done on a new program. Course equivalents will be reviewed by Ed Services. There was a comment that it would be best to have a program in place before new assessors are hired.

Reassessment Course Materials

After reviewing the Mass Appraisal course materials Teresa Frank and Chris Bannister recommended that we use the Mass Appraisal course materials and supplement them with additional information to sufficiently cover the reassessment component. They also feel this can be done without extending the course beyond three full days. It was noted that the Mass Appraisal course was once called Mass Appraisal and the Reassessment Process. To make this change some course development will be necessary. Chris Bannister and Teresa Frank may be interested in working on this project. Ann Sapienza is very interested in the Reassessment course and has training experience which makes her a good asset to the group. Cathy will speak with Ann about it. Chris plans to talk about this at the manager's meeting and inquire about schedules and available resources. Ed Services will also look into their resources.

Training Status/News/Misc Topics

Assessors:

- The NYSAA Fall Conference is scheduled for next week.
- Shirley Bement arranged the Educational Program.

- It is expected that 250 will attend.
- Cornell had 166 attending the conference.
- The one-day Seminars are going well – there are about 10 seminars still scheduled.

Directors:

- The County Director Conference is scheduled for October 4 -6, 2010 in Syracuse.
- Tax Mapping and Tax Enforcement course will be offered for new County Directors and for continuing education credit.
- John Zukowski is teaching Valuing Subsidized Housing
- It is expected that the conference will have about 30 in attendance.
- An Erie County attorney will also be speaking.

ORPTS:

- ORPS moved to the W.A. Harriman State Campus Building and merged into The Department of Taxation and Finance on June 25, 2010.
- The Summer Training School was not held this year.
- There is a new Training Schedule that was recently sent out to the Assessment community.
- Assessors and County Directors are still being reimbursed for training.

Continuing Education Rules

The group reviewed the report, Reassessment Practicum Concept, and the email that Jeff Bartholomew prepared. Most of the discussion centered around whether this is something that an assessor should be getting continuing education credit for or is it part of their job. It was agreed that Reassessment is a learning experience, but after going through the cycle once, it can be repetitive. There may be changes that occur from year to year but it's questionable if they are credit worthy or just part of the assessor's job.

The group also discussed the CRMs ability to get involved with a project like this. They would need to be consistent when they monitor and keep track of the assessor's accomplishments. He would need specific objectives, so if not accomplished he could determine failure.

An idea to accomplish this might be a case study – that is completed by applying, practicing and has an outcome in the end. Determination may be through accomplishing the objectives or based on the outcome. This may only be credit worthy for one time. Probably should not be repeated every three years for credit.

The group agreed that this is not totally without merit but feels a lot more definition is required before it can be presented to the Assessment Community or considered to be included in the rule's revision. It's important not to run the risk of awarding continuing education credit for the assessor just doing their job. Cathy said she will bring the idea to the Board of Trustees for their input.

Basic Valuation/Ethics/Commercial/Industrial Courses

The Commercial/ Industrial course went very well; the content and the presenter were both excellent. The course covered everything that was expected. The feedback was good. It is not scheduled again at this time. The NYSAA plans to schedule the "Three Approaches to Value" and "Valuation Principles & Procedures" this fall.

The Ethics and the Assessor course is scheduled on October 8, 2010 and 20 are enrolled. New assessors/county directors and recently re-elected assessors require this course. The plan is to offer Ethics

once a year in each of the regions. John Zukowski plans to teach a 15 hour USPAP class in October, assessors can take this and get credit for their Ethics component.

Board of Assessment Review Training

The BAR training materials were discussed recently at a RPTAC meeting. The BAR materials are available on-line for the County Directors to use. The concern is that the County has to print them and distribute to all BAR members attending the training. This is how most County Directors handle the BAR Training. The BAR members do not have access to the materials on-line.

Some Assessors would also like to have copies of these materials in their assessors' offices but they do not have access either. In addition, whenever a statute change is necessary, the materials are updated but are not designed to replace page-for-page, so the entire manual needs to be printed. The county directors would like ORPTS to provide a page of info about what changes were made to the manual from one year to the next.

Another issue the group discussed was the BAR Training video. It was produced in 2001 and many feel it is outdated. It was asked if a CD could be created so they can be provided to members, assessors and maybe available on our website for the public to view. Some feel that the video is a training tool and not meant to be a standalone video. Issues raised on the CD are left unresolved in various vignettes in order to facilitate discussion at the training classes. This would not be appropriate on the ORPTS website.

The group discussed some ways to provide better options for the County Directors and the BAR members. ORPTS plans to look into the cost of an updated BAR Training video/CD. Another thought was to have this information available on the website for not only County Directors but BAR Members and assessors. This could create an additional 3,900 new customers and workload for ORPTS could be overwhelming. May be able to use a self registration option to connect to the training portal. Paul will look into some options and report back to the group at the next meeting. Shirley will talk with County Directors to get their recommendations on where we should make improvements.

Action Items/Next Steps:

A sub group will be formed to review the Apprenticeship Program and report back at the next meeting. Materials will be sent to the group which may be helpful for development of the Apprenticeship Program. Shirley will discuss the Apprenticeship Program with the County Directors to get their recommendation. Cathy will speak with Ann Sapienza about working on the Mass Appraisal/Reassessment course revisions.

Cathy will provide the Board of Trustees with information about the Reassessment Practicum Concept for their input.

Paul will look into options for improving the BAR materials/program.

Shirley will speak with County Directors about improvements for BAR program/materials.

Agenda Items:

Proposed Rules - Minimum Qualifications/Apprenticeship Program

NYC Update

Reassessment Course Materials

Continuing Education Rules

Basic Courses

BAR Training

Next Meeting: March 2011 (The group liked Tuesdays and Thursdays best.) Meeting date to be determined by the group.