

Training Advisory Group Meeting Minutes
March 14, 2013 – Teleconference, Albany and Batavia

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Nathan Gabbert, Dan Martonis, Pat McVee (New Member), Eugene Monaco, Paul Szwed, Don Weber, Maureen Wetter (Facilitator), John Zukowski

Others Attending: Sean Fitzsimmons

Recorder: Joan Wiech

The minutes of the September meeting have been posted to the website.

There were technical problems with connecting the video conference. We used a teleconference instead.

BAR Video/Powerpoint

ORPTS staff and DTF Communications office staff have developed a new BAR Video. The video is divided into three segments. Each segment has been reviewed by the Legal Department. Also, the segments have been compared to the BAR Training Manual and edits have been made where necessary to keep both in sync.

The completion target date is March 15, 2013. A copy of the video will be sent for viewing to the Training Advisory members. The plan is to have it ready for distribution to the County Directors by the end of March.

Gene mentioned we may require “sign off releases” when using live actors in the video. ORPTS will check with the DTF Communication office to see what the requirements are.

Kathy mentioned an issue with the power point presentation where the “seating arrangement” portion was blank. It has been fixed, portraying an equal /comparable footing between the assessor, BAR members and the taxpayer.

Grounds for Complaint is another topic that still needs some clarification. Using the power point presentation, the trainer can go into more detail about the forms and the clarification of the different grounds for complaints.

The taxpayer and BAR members both need to better understand Excessive Assessment. It appears the forms need to be revised and simplified. It needs to be clear that there are mandatory fields that the taxpayer must fill out. Some Boards use their own Determination Letter. ORPTS will look into assistance from the Legal Office about revising the forms in the future.

On page 25 of the power point presentation, the bullet that states “requires an attorney” should be removed. Usually an attorney is involved, as it is helpful, but not required.

Chris pointed out a concern on page 15, the last bullet, wording of “market value trends” may be taken literally. Take out “trends.”

The team thought the presentation was very well done and the length is appropriate.

The group discussed BAR training options for counties without a County Director. In the past, ORPTS staff have done some BAR training. BAR members can attend other counties to complete their training. EDS has a report of the BAR training dates for each county. Maureen will look into this and send the BAR Training Schedule report to Suzette for distribution to the County Directors.

Statewide Learning Management System

The SLMS is a method where State employees can register for training and track their training history. It is expected to be used for external training in the future for all State agencies. EDS currently offers external on-line classes using Top Class software. The contract for the Top Class system will expire May 2016. This software probably will not be renewed given that the SLMS is an initiative from the Governor. Paul feels now is a good time to look into how this will affect the external on-line training system in EDS. It is a good idea to address questions now before the actual conversion may take place. Gene mentioned that many agencies are having the same concerns and converting to the SLMS can be cumbersome.

Ethics Recertification

There have been 6 Ethics training classes that have trained 140 students since October 2012. USPAP classes have trained 27 students. Nine more Ethics classes are scheduled through the end of 2013. There are 47 uncertified assessors that require this course for basic training certification. Also, about 591 certified assessors (Appointed – 540; Elected – 91) also require this course. All classes have been well attended. There will probably be the same number of Ethics training classes scheduled for 2014.

Instructor Qualifications

The group discussed the process for approval of Ethics instructors. Currently, they are reviewed on a case-by-case basis. The most important skills for an instructor to have are compelling presentation skills, content expertise, strong listening skills and “Adult Learning Theory”. They need to have consistency and the trust and confidence of their audience.

When the course was a new requirement there were assessors teaching the course along with Legal counsel. There are very good training classes for instructors offered by NYSAA which are usually offered at Cornell. These classes generally are very successful. Once trained as an instructor, it might be a good idea to provide specific instruction on Ethics, dealing with New York State, Ethics behavior, right to know and being equitable. Because Ethics is “so specialized” it was suggested that an outline be developed for conducting a short seminar on “Teaching Ethics to Assessors”. Real cases (without mentioning names, towns, etc) are very good training tools.

New instructors should also start out co-training with a seasoned instructor. They can get experience in classroom control and management. Their first training experience should be short – maybe a half day. Later, review evaluations and ratings.

New York City Training

New York City hired assessors/staff in 2011 and some more in 2012 to total 40 people needing basic courses. Course IAAO 101 was held in August 2012. Ethics and the Assessor was held in September 2012. Course IAAO 102 was held in March 2013. All of the recently held courses were well attended. IAAO Course 112 is scheduled for April 22, 2013.

The City still plans on creating Assessment Admin and Data Collection courses for City assessors but ORPTS hasn't been given an outline for review yet.

Mass Appraisal / Reassessment Course

The premier of the revised Mass Appraisal course is set to be delivered in the Northern region. The course instructors are Nick Berry and Meghan Frye. It is also on the schedule for Cornell in the summer of 2013. Courses have a minimum enrollment required in order to hold it, based on the length and the cost of the course.

Class Offerings/Needs

The Commercial/Industrial course was held in the Fall of 2012. Since only a few County Directors/assessors need it, there is no need to schedule another offering now. It might be a good idea to add it to Cornell's agenda for 2014. There are 72 assessors who require the Mass Appraisal course for basic training. The Cost/Market/Income component (Valuation Courses 1 and 2) are scheduled at Cornell, about 70 assessors require this component – consisting of 2 weeks of training. Probably will need to schedule more valuation course offerings in the fall of 2013. Assessment Administration (on-line) & Data Collection are both available on the ORPTS training schedule.

Training Status/New/ Misc Topics

Suzette raised an issue that was forwarded by another Director. The director has concerns with finding qualified candidates for a very rural locality and was questioning the minimum qualifications for assessors. Through discussion it was mentioned that minimum qualifications will remain unchanged. In the recent past even more stringent quals were considered but not adopted. Alternate strategies are outlined in a publication on the website and were provided to the director.

Assessors:

- The Cornell seminar is scheduled for July 15 – 19, 2013 and the courses scheduled are:
 - Course 1- Appraisal Principles & Practices
 - Course 2 – Appraisal of Three Approaches to Value
 - IAO-2, Exemptions
 - Commercial Data Collection
 - Mass Appraisal Fundamentals
 - Excel Ratio Studies/Analysis-RPV-4
 - Ag Valuation/Reval.
 - Apartments/Market & Subsidized Valuation
 - Single Family Appraisal
 - Unusual Property Valuation
- The Assessor's Fall Conference is scheduled for October 2 -4, 2013 at the Crown Plaza in Lake Placid.

Directors:

- The County Director's Fall Conference is scheduled for October 21 – 23, 2013 at the Embassy Suites in Syracuse. The agenda is not ready yet; but the Ethics course is a possibility.

ORPTS:

- The new Training Schedule has been posted to the website and has training scheduled from April through October, 2013.

Action Items

Look into qualifications for instructor training – Paul will distribute a draft document for team review.

BAR Training Schedule – sent to Suzette on 3/15 - done

ORPTS will provide the final BAR Power Point presentation to Advisory Group - done 3/21

BAR Video requirements/news

Develop and send a BAR Survey to Directors after the spring training sessions (who will do this?)

Send out Charter with minutes for discussion at next meeting

ORPTS will explore revision of Grievance form instructions and “BAR Determination Notice”

ORPTS will explore the idea of producing a tutorial for the public – “How to fill out a Grievance Form”

Test video conferencing connection in advance.

Next Meeting:

Videoconference: Albany & Batavia.

DATE: September 12

Agenda Items

Charter review – 4 year renewal time

SLMS News

Bar Training Video and Power Point materials

BAR Training Survey

New York City Training

Ethics/ Reappt./ Recertification

Mass Appraisal course update

Training Needs