

Training Advisory Group Meeting March 3, 2010

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Sally Cooney (Facilitator), Stephen Harris, Gene Monaco, John Zukowski

Others Attending: Sean Fitzsimmons, Jim O’Keeffe

Recorder: Joan Wiech

Absent: Shirley Bement, David Briggs, Maureen Wetter

Minutes from the October 8, 2009 meeting have been posted to the website.

Charter

Vic Mallison signed the charter representing ORPS and Robin Johnson signed the Charter representing the County Directors. Cathy Conklin did not sign the Charter prior to this meeting because of concerns she had with references in the Charter to Executive Director and the fact that the charter was being signed by the Executive Deputy Director. She questioned whether the Charter should be revised to accommodate this and the planned merger of ORPS with Tax and Finance. Jim explained that ORPS will remain a separate division within the Tax and Finance department. The powers and duties of the State Board will be given to the present Commissioner of Tax and Finance, with the exception of complaints. A Deputy Commissioner will be appointed to head the division of the Office of Real Property Tax Services. Simply put, the Commissioner of Tax and Finance will replace the State Board and the Deputy Commissioner will replace the Executive Director. Tax and Finance seems committed to appointing a Deputy Commissioner with Real Property Tax experience. At this time, Vic is in charge and ORPS plans to continue to function as before.

Cathy agreed to sign the Charter representing the Assessors, noting that she still has some difficulty with some of the technicalities of the way the charter reads.

At Large Membership Vacancy

The group agreed to postpone the appointment of an at large member until there is a clearer direction of the advisory group after the merger with Tax and Finance. Nathan Gabbert was appointed for two years to fill Tom Frey’s vacancy. David Briggs and Maureen Wetter were both reappointed to three year terms. Stephen Harris, County Director in Chemung County, will replace David Hastings, who will soon retire as County Director of Oswego County.

Proposed Rules-Minimum Qualification Standards

A copy of the revised rules were sent to the group for review. The group agreed that qualified, professional assessors are important but still feels that filling future assessor vacancies will be difficult. It was mentioned that consolidation may be an option and in some cases a necessity.

Some group members felt that the revisions/additions to the rules aren’t structured enough. They thought the lack of detail would make it difficult to measure qualifying experience while others thought the details of measuring qualifying experience of an individual should not be defined in the rules. It was stated that the revisions made replaced what was previously there to simplify the process and give prospective assessors and County Directors more opportunities to gain qualifying experience.

The group discussed some concerns about how ORPS plans to administer the apprenticeship and had some questions about the type of apprenticeship, the requirement for basic course of training, whether prior approval is required and if previous experience will be acceptable.

ORPS plans to define the apprenticeship program in greater detail; however, it is still hoped that a certain degree of flexibility will be maintained to allow both municipalities and individuals more options.

Jim agreed to make some minor revisions to the draft rules and they will be sent to the advisory group members for review. Assessor and County Director representatives on the TAG will share the draft rules with their associations and solicit their comments. A teleconference will be set up to discuss the feedback in the next few months and to determine whether additional revisions are necessary.

Jim also explained that the approval process for rules has not changed and it may take up to 6-7 months to complete the process. The group mentioned, for future planning, municipalities need to know about revisions as soon as possible.

Reassessment Course /Component

Sally reported that she had discussed the proposed reassessment course with regional managers and directors at their February meeting. Regional staff felt that the Mass Appraisal course, which is part of the basic certification program, provided much of the information that should be included in a course on reassessment. They felt it was a waste of time to develop a new course when there was already one available that met most of the requirements. Teresa Frank and Chris Bannister volunteered to review the Mass Appraisal course materials and identify what additional information should be included in the course. Chris noted that she has taught the Mass Appraisal course on a number of occasions and is very familiar with the curriculum. She thinks that it will be possible to supplement the existing course without extending the course to another day. Chris will contact Anne Sapienza (who was the assessor's representative on the KSA team for the new course) to see whether she would be interested in participating in the review of the Mass Appraisal curriculum.

New York City Update

The Department of Finance has 109 certified assessors and 20 uncertified assessors and the Tax Commission and Law Department has 5 certified assessors and 9 uncertified assessors.

Training Status/News/Miscellaneous Topics

ORPS:

- The deadline for accepting bids for the 2010 summer training was February 17, 2010. Staff will review and evaluate this information to see if the summer training is the best option financially for assessor training. (Update: a decision has been made, based on financial considerations, to not offer a Summer Program sponsored by ORPS in 2010.)
- The training reimbursement appropriation proposed in the 2010/2011 budget is \$400,000: \$350,000 for upstate New York and \$50,000 for New York City. With the new continuing education limits in place staff feels this appropriation should be sufficient to provide for reimbursement of required training.
- ORPS budget will be separate from Tax and Finance after the planned merger.
- The approval process for assessor training is still the same process as before. Staff is beginning the process to get approval for 2010 Cornell conference. (Update: Cornell has been approved for reimbursement)

Assessors:

- Continue preparing for 2010 Cornell.
- Courses are being modified, to eliminate a night of lodging, to keep the reimbursement costs down.
- Assessors are interested when approval from DOB will be completed since the enrollments for Cornell increased after DOB approval last year.

Directors:

- Planning for conference-scheduled for October 2010 in Syracuse NY.

ORPS Merger with Tax and Finance/Budget Update

ORPS has had several meetings with Division Heads of Tax and Finance about the merger. Informational meetings have been conducted for ORPS staff. At this time, there are still a lot of unanswered questions about the agency physically moving. ORPS is proceeding as if we are going to be merged with Tax and Finance, but until we have a specific location, no other definite plans can be made. (Update: ORPS will be moving to the State Office Campus in late June.)

Continuing Education Rules

The group discussed the Reassessment Practicum proposal that Jeff Bartholomew prepared. The concept is that under the direction of the regional CRM, while conducting a reassessment, the applicant could qualify for 12 continuing education credits for completing the various steps involved in the project. Many in the group agreed that conducting a reassessment can be a great learning process but thought that we may be awarding continuing education credit to an assessor for just doing their job. Another concern was how to measure and monitor the process. During a reassessment project the assessor's activity varies. If a contractor is involved the assessor may be actively involved in the reassessment or not at all. In this case, it may be necessary for someone to determine how many continuing education credit hours the assessor is entitled to. The group also discussed how often an assessor can apply for continuing education credit for conducting a reassessment. Some municipalities conduct reassessments annually. Although reassessments can change each time and still be considered a new learning experience it may not be worth 12 continuing education hours each time. One idea was that ORPS could put a limit on applying for reassessment continuing education credit, for example, once every three years. Or maybe an assessor can apply for credit only once. Another issue discussed was whether an assessor would get credit for a reassessment project that wasn't successful even though the process/steps were all performed correctly.

There was also a question asked about how involved County Directors and regional staff should be in this process. It may be possible to provide documentation that includes various steps required to complete this process for credit. Some assessors may get assistance from others, in that event they may be awarded less continuing education credit. Another consideration was how EDS will administer and track this process.

Everyone felt that conducting a reassessment can be a valuable learning experience for an assessor. The assessors and County Directors agreed that a more detailed description of this proposal is necessary before they would consider it. Chris will inform Jeff of the group's discussion and their request for more information on the proposal.

Basic Valuation/Ethics/Commercial/Industrial Courses

There will be four Ethics courses conducted in the next six months. The Commercial Industrial course was sent to Maureen for review and approval. John would like some feedback from EDS on the number of questions expected for the exam.

Action Items/Next Steps

Revise rules and send to group

Set up a teleconference in the next few months to discuss rules revisions

Chris will talk with Jeff about a detailed report for the reassessment practicum to share with group

Agenda Items:

Proposed rules

NYC update

Reassessment practicum

Flesh out apprenticeship program min quals

Next Meeting

September 15, 2010

Albany