

## **Real Property Administration Training Governance Group Meeting**

October 18, 2007

Video Conference between Syracuse & Albany Office

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

Resource: Phil Hawver, Jim O'Keeffe, Maureen Wetter

Recorder: Joan Wiech

Absent: Nelson Bills, Joe Maciejewski, John Zukowski

The minutes from the June 7, 2007 meeting were posted to the website.

### **Assessment Administration, Commercial/Industrial, Mass Appraisal**

The New Program Course Development Status / October 2007 report was handed out to the group. The completion date for the Mass Appraisal course was extended by a month. The next step for Commercial/Industrial Valuation is to set up a meeting with Dave Burger and John Zukowski to determine course equivalents. All other courses are on track according to the status report.

The Assessment Administration course is being scheduled for 5 days. To accomplish this the students will have online pre-work as well as homework during the week. For example, the Exemption section of the course will be taught over a two day period so the students can take home exercises to complete and go over the next day in class. A dry run for the Assessment Administration course will be held in December or January. The first offering is scheduled for February 2008.

The Data Collection on-line course will continue to have a two-day classroom requirement.

### **Tax Mapping, Tax Collection and Enforcement**

The Task Analysis Worksheets for Tax Mapping & Tax Collection and Enforcement were handed out and discussed. The KSA's are final and other than some minor updates to the course materials, the course materials are complete. The outlines and power point presentations will be e-mailed to the group.

The courses are only offered to County Directors as necessary. Since the Tax Mapping course is beneficial to the assessor they will receive continuing education credit for taking the course. The GIS portion of the training is only a general introduction conducted in a ½ day session.

### **Cost, Market and Income Approaches to Value, Ethics**

The Instructor Manuals for Appraisal Principles and Procedures and Application of the Three Approaches to Value were handed out to the group. One text book will be used for both courses and the book's cost is \$ 75.00. The courses are in the proofreading stage and a copy will be sent to ORPS as soon as proofreading is complete. The timeframe for each course is five days. At this point the exam is not open book but following a group

discussion it was decided that they will explore and consider some possible options concerning the exam.

The Ethics and the Assessor outline was also handed out to the group. This course is intended to train Assessors in New York State. It is scheduled to run 6-7 hours. It is expected to be scheduled in 2008 in all regions. The group agreed that the classroom training would be offered for one year before developing an on-line version of the course. Please e-mail Tom Frey with comments on the outlines.

At this point the USPAP courses will remain acceptable equivalents for the Ethics course requirement even though it is geared for appraisers. We will revisit this topic in the future to decide whether it remains on the approved list.

The IAAO Standards & Ethics course will be offered in Lake Placid in June 2008. This course has not been reviewed for approval for assessor's training requirements.

### **Training Status News/Misc Topics**

#### *Directors:*

- The County Director conference was successful.
- The draft outline for the winter conference should be out soon. One-day sessions will be available.

#### *Assessors:*

- There are two G-1 courses scheduled in December. The dates are: Albany - December 5<sup>th</sup> and Syracuse - December 10<sup>th</sup>. The assessors who require this course were sent letters.
- The conference in Buffalo went well.
- Finishing the one-day seminar program for 2008. Working on Cornell 2008.
- Sponsoring a conference in May at the Northeast Regional Association of Assessing Officers.
- The next item to begin planning is Association of Towns in New York City.

#### *ORPS:*

- Association of Towns is scheduled for February 17 – 20, 2008 at the New York Hilton. Please email topics to Maureen.
- SUNY IT went well.
- The Assessor and County Director Training Catalog has been updated and will be included in the yearly CE mailing.
- Two Ethics courses have been scheduled for Assessors. The dates are: Albany - November 28<sup>th</sup> and Newburgh - November 29<sup>th</sup>. The class size is limited to 22.

#### *Important dates for 2008:*

January 28 – 30, NYSAC/County Directors  
July 27 – 30, County Director Summer Conference  
August 3 – 8, Summer Training School  
September 21 – 24, Assessor's Fall Conference

### **NYC Training Program**

The Mass Appraisal and Advanced Income courses were offered to New York City assessors in June and July. Educational Services staff plans to schedule five Ethics courses in January/February 2008 and one Mass Appraisal and Advanced Income course (for those who either failed or were unable to take the courses in 2007) in the spring.

Statute was amended this past summer, which provided an additional year for NYC assessors to complete their required training and also required assessors in the Department of Law as well as the Tax Commission to meet certification requirements. Since the assessors in these agencies do not have the same responsibilities as the assessors in the Department of Finance, it is likely that rules will need to be amended to accommodate their training needs. A letter was sent to the three agency heads this past summer regarding the change in statute and suggesting that a meeting be scheduled to discuss some of the outstanding issues. Two of the agency heads have responded and it is anticipated that a follow-up letter will be sent in the near future and a meeting scheduled with NYC officials.

As requested at the previous Training Governance meeting, Cyndy provided the team with information related to the money spent out of the 2006/07 appropriation for training offered to NYC assessors.

### **Assessor and County Director Rules**

The State Board gave final approval to the rule amendments revising the basic course of training for assessors and county directors at their meeting on July 31.

The County Directors are interested in pursuing an amendment to rules reducing the minimum qualification classifications from three to one (requiring that all new county directors meet the requirement for the current class 3, which is the highest level). They would like the new requirement to take effect October 1, 2013 - the start of the next reappointment term.

### **Fiscal Update**

Maureen handed out and explained the Assessor/County Director Reimbursement Review report. Maximum lodging has gone up in some areas but overall reimbursement figures are down because attendance at training has been down so far in 2007.

Summer Training at Utica – 2006 – 256 attended

2007 – 196 attended

Fall Conference - 2006 – 232 attended

2007 – 176 attended

There may be a need to pro-rate reimbursement for continuing education this fiscal year.

### **Where are we now that 10/1 has arrived ?**

Maureen handed out the New Certification Programs for Assessors and County Directors effective October 1, 2007 and explained the order of the process of certification. The review process needs to be handled separately for each assessor. The computer system is not able to process equivalents according to the new rules. Another part of the review

process is to award (extra) time to complete certification for those assessors and county directors who remained uncertified as of October 1. At this point there are 92 assessors who require review. Additionally, there are Real Property Appraisers, Candidate for Assessors and new Assessors (October 2007) requiring review.

The G-1 course is being offered in the fall/winter and assessors who complete this course (and previously completed R1 and R2) by December will be given credit for Cost, Market and Income Approach to Value toward their certification.

Concern was expressed as to how the new program is presented to the public. Rules require that specific courses be completed for each year in order to meet the minimum requirements for interim certification. For example, in year one a new assessor must complete Orientation, Ethics and Fundamentals of Assessment Administration.

However, an assessor may work ahead on training requirements as long as they have completed the minimum requirements for each year. Data Collection was identified as one of the courses that assessors would benefit from taking earlier rather than later even though rules don't require taking it until year three. The rules establish minimums.

A copy of the Communication Plan: Ethics Recertification and New Basic Program for 2007 that was prepared for the RPTAC meeting was handed out. It shows what has been completed up to this point and what is planned for the next few months along with a list of the ongoing processes.

### **RPT Equity Information Gathering Report**

Cathy Conklin explained that a group of assessors, county directors and ORPS staff formed a team (at the direction of RPTAC) and held a series of information gathering sessions throughout the State in November of 2006. The sessions were designed to gather input from the real property tax administration community regarding assessment equity as well as the issues affecting the performance of the real property tax system. Comments received by this group related to training were shared with the Training Governance Group for further discussion and identification of possible action items.

The group discussed the BAR/SCAR training issues.

The group agreed that the BAR Training video/materials should be reviewed and updated. It was questioned as to whether the video is an effective approach. Some other issues were to update the BAR Training Manual and to have the BAR Training on the website. The group also discussed whether BAR Training Materials should go through the same process (KSA's & development) as the assessor training courses.

There were some thoughts on whether the BAR training video would be useful for the SCAR training. ORPS may not have a role in the training program for SCAR officials. The Office of Court Administration should be contacted for clarification on the training of SCAR officials. It was noted that some issues have already been dealt with and some issues may not be a concern for the Training Governance Group.

### **Decision**

It was decided that the Training Governance Group will review the information and discuss it at our next meeting.

**AGENDA**

Review Membership  
Update of Courses  
Status of New Program  
NYC Training Program Update/Rules  
RPT Equity Information Report / BAR Training

**ACTION ITEMS**

Add a column to the New Program Development Status Report to show the versions each course has available  
Review handouts (Cost, Market and Income Approach & Ethics) and send comments to Tom Frey  
Group review of RPT Equity Information  
Contact Geoff Gloak- Job of the Assessor, video cost for comparison for BAR video

**NEXT MEETING**

March 13, 2007  
All group members meet in Albany