

## **Training Advisory Group Meeting Minutes September 12, 2013 – Teleconference, Albany and Batavia**

Present: Suzette Booy, Cathy Conklin, Dan Martonis, Pat McVee, Eugene Monaco,  
Paul Szwedo (Facilitator), Don Weber, Maureen Wetter, John Zukowski

Others Attending: Anne Sapienza

Recorder: Joan Wiech

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

<http://www.tax.ny.gov/research/property/assess/training/governance/index.htm>

### **Mass Appraisal / Reassessment Course**

Anne Sapienza shared feedback with the group on the revised Mass Appraisal/Reassessment Course that was recently held at Cornell. The training class had a total of 15 students enrolled, both County Directors and Assessors.

The timeframe of the course was good as long as you used the book material only. She feels that assessors need a better understanding of the “sales ratio” topic to fully understand Mass Appraisal. Anne suggested that Basic RPS training should be integrated into the course to show students how to apply what they are learning. This may or may not increase the length of the course.

She mentioned the course material does not reference the IAAO Standard by section and page number and suggested that it be added to the course material. She told the students about this in class. Also, the Assessor’s Manual Volume 3 is mentioned in some areas throughout the course material and should be removed since it is an outdated reference.

She will email a unit by unit report of the feedback from the students on the course conducted at Cornell.

The revised Mass Appraisal course was also held in the Northern Region. The instructors were Nick Berry and Meighan Frye and there were 7 students enrolled. Overall the instructors felt that the timeframe of the course was sufficient. They did make some necessary changes to the power point slide show. Also, they suggested a thorough review of the exam questions. It was also suggested to incorporate a homework assignment between Day 2 & Day 3 of the training course on “Sales Ratio Studies.” This would give the students a chance to review the information so they are prepared for the next day of training. Also, it would give them an opportunity to ask questions prior to the start of the unit. It is important to note that some students come from different backgrounds and have had varying experiences, which has a bearing on how well they do in a particular course.

On a scale of 1-4 the 7 students enrolled rated this course a 3.6 for course content. As to applying this information to their present job duties, it was given between and 80 -100% useful. Some students also suggested the order of the presentation between the manual and the overhead slides should be revised. The instructor mentioned that it was an advantage to have a smaller class size.

The group discussed having an analysis done to review and see what exam questions need the most attention. The group would also like to see the pass – fail results for the 2 classes conducted so far.  
**Action item:** Maureen said she can get that information for the group.

Paul mentioned that the agency has purchased some new testing software which may aid in the analysis.

### **Training Advisory Group Charter Review**

Paul advised the group that the Charter handout has been revised with technical changes to incorporate names, department name, rule numbering changes. He asked the team's input on the present revisions and if anyone has any additional revisions at this time. He also asked the group to make note that the Charter's expiration date is December 2014 and that now is a good time to think about what, if any, changes will need to be addressed. The Charter is a good tool to develop a common understanding of expectations and roles.

The group agreed with the technical changes that were made to the Charter. Gene made a recommendation that on page 3 of the Charter not to use the Assistant Deputy Commissioner's actual name, but list only the job title to make it consistent with the other titles on the document. That way, if a personnel change occurred, there would be no need to revise the charter again.

The group also discussed the Training Topics: Evaluation portion of the Charter. At this point we will need to decide if this topic should be left in or taken out of the Charter. The group discussed why there is good reason to evaluate the program. The intent of the Charter, since redefining the Basic program was to review and revise courses so they are providing the necessary training. The group agrees that the next step is to evaluate these courses for their effectiveness and to see if the appropriate training is being provided.

First, we will need to define "what" we need to evaluate for the process to be effective. The program has both Basic and Continuing Education courses. There are also Online courses. These courses have evaluations at the end of the class which will be useful. It may be useful to survey students for feedback again after 6 months elapses. There are several models and programs that we can use that could provide support on how to structure exam questions also. We will need to consider cost, availability and delivery.

It was mentioned that the Assessment Administration course hasn't been revised since 2007 and there may be changes that should be incorporated into the course. This review could be quite involved because of the volume of course materials.

**Action Item:** Paul asked that all members of the group think about evaluations and make suggestions. Gene also has offered to provide an outline of the evaluation model they use, which will be something we can follow and make additions to as needed. This will be an agenda topic for the next meeting but in the meantime we will circulate ideas, information and feedback via email. Gene may arrange a guest speaker for next meeting.

### **BAR Feedback from Survey**

The group discussed the BAR feedback survey and mentioned some topics that will need reviewing. The survey had a 54% response rate and 80% used the new presentation. For those that did not use the presentation it appears it was more of a "timing issue" and will most likely use it in 2014. Overall, it was well received. It was suggested to follow-up with 3 counties who disliked the revised presentation. Their feedback may be helpful. The two main problems mentioned were repetitiveness in the power point presentation and the sound volume issues in one video segment. We were aware of the sound volume issues but were not able to reshoot in time for this year. Idea – let's repeat the BAR survey again after 2014 BAR training.

**Action Item:** Paul will explore the possibility of doing a reshoot of the one video with low volume problem in time for the 2014 training.

**Action Item:** Suzette will look into the repetitive slide issues and get feedback from other County Directors. She will recommend specific revisions to eliminate the repetitiveness.

### **e-government tools**

Two-way Listservs are no longer available. The new “gov delivery” is a one way communication tool. Our group needs a two-way email list to communicate with each other. Maureen has created an email List for Training Advisory members which we will continue to use. This will enable the group to communicate with everyone. It was requested that a list be available with the group’s email addresses in the event that someone would like to initiate their own email group.

**Action Item:** Maureen will compile a list with everyone’s name and email address and send it out with the minutes.

### **Instructor Qualifications**

The group discussed the Instructor Qualification DRAFT and whether these qualifications apply to all instructors or are they intended just for the Ethics instructors. It was agreed that this should apply for all instructors. There may be other requirements more specific to a course in some cases but this can be a good starting place and a useful tool. Since there isn’t anything in writing, it can be used as a general guideline for candidates to follow. The group decided there are a few instances where the word “must” should be changed to “should.”

**Action Item:** Paul will revise the draft document with the corrections the group agreed to and re-distribute it.

### **New York City Training**

New York City plans to hire 6 – 10 new Assessors/Modelers and some assistant assessors to be in place for early 2014. There will be a need to start more training sessions for the new appointees. IAAO Course 101 and 102 and ethics will be scheduled for new assessors. And IAAO Course 300 and 312 will be scheduled for the “2011” group of assessors. Tentative dates are between February and June of 2014. The DOF plans to use ORPTS course materials as a starting point to create Assessment Administration and Data Collection courses for New York City assessors. Maureen plans to work with the scheduling of the courses so that they are balanced to make the best use of the limited reimbursement funds.

### **Statewide Learning Management System**

ORPTS has 4 courses on-line at this time. The instructors interact with students, and final exams are held at the regional offices. The software contract for ORPTS on-line training will expire in 2016. We are now exploring options for online training through the Statewide Learning Management System (SLMS). ORPTS, DTF Training unit and GOER (Governor’s Office) met to discuss a plan.

Paul outlined the first 2 Phases of converting to SLMS.

Phase 1 – use SLMS to deliver on-line training. We have to move the present course content to the new system. There is a program called TOOLBOOK used by DTF that will help with this process. We then need to establish connectivity to the secure directory services for the new software. We also need to provide a communication tool to enable students and instructors to communicate with each other. DTF Training unit will look into communication software for us.

Phase 2 – Mirror the EdS system tracking capabilities. The goal here is to use the SLMS for tracking courses, continuing education credit, non-compliance and reimbursement.

To accomplish Phase 1, we need to begin by mapping activity of how users get created in our present system. We can use the help of staff and the TOOLBOOK to convert course content. We will have to estimate how many licenses are required, considering taking the training classes, being able to look at your training record and some other useful ways to use the system.

Presently the courses available on-line are Assessment Administration, Data Collection (blended learning), Mass Appraisal and Sales Data Management. Some of these courses may require revisions but we will wait until we get involved in the TOOLBOOK process before making course revisions.

### **Class Offerings**

Maureen sent needs reports to NYSAA specifying names and addresses of assessors who require training in the Cost, Market and Income component in anticipation of a fall course offering.

Needs Basic Training:

Cost/Market/Income – 76 require training (planned for Cornell and the fall)

Fundamental of Mass Appraisal – 92 require training

Data Collection – 30 require training

Assessment Administration – 33 require training

Farm Appraisal – 75 require training

Ethics – basic – 45 require training

- There were 678 people who are required to complete this training and 300 of them completed it in 2012-13 so far. There is ethics training scheduled in Watertown, Syracuse, Auburn and Lockport in 2013. Will still need more training classes for 2014 for approximately 250 who did not take ethics in 2012-13.

Commercial /Industrial - 8 County Directors require training (not scheduled at this time) but is tentatively planned for Cornell 2014.

### **Training Status/New/ Misc Topics**

Assessors:

- The Conference is scheduled in Lake Placid on Oct 1 – Oct 4, 2013, which is Tuesday to Friday this year.
- Some classes scheduled are Appreciating depreciation, BAR Training for Assessors, Architectural Styles, Ag. Values and Exemptions and mini –module sessions will also be offered.
- Also some interesting General Session panels: Green Energy and STAR/New Legislation
- Shirley Bement will step down as coordinator after this year. Replacement to be determined.

Directors:

- County directors conference is planned for Syracuse, October 21-23. Topics include a one day Ethics seminar, Tax Collection and Tax Mapping, STAR and Legislation, Cyber Security, Shared Services, Correction of Errors.

ORPTS:

- The new Training Schedule (November 2012 – April 2014) will be posted to the website soon.
- In June, Educational Services e-mailed out requests for reappointment information and term dates to municipalities and counties. About 43 % have reported back.
- Plan for November mailing to request information on addresses, emails, etc. from municipalities and get those remaining reappointments if not already received by ORPTS.
- Discussed with the group a few ideas to get more responses returned. Maureen will wait until after the Oct. 1 date is passed.
- **Action item:** Maureen will send a Term Date report to each county director and request assistance to contact towns who have not reported reappointment information back to ORPTS.

## Next Meeting

**Tentative: Friday, March 14, 2014 in Batavia and Albany**

### Action Items

**Action item (Mass Appraisal):** recent Mass Appraisal exam results –

- 3/26/13- Albany classroom (5 pass, 2 fail)
- 4/1/13 – online (15 pass, 0 fail)
- 7/16/13 – Cornell classroom (14 pass, 0 fail)
- 9/18/13 – Albany classroom (6 pass, 0 fail)

**Action Item (Charter - Evaluation of the training program):**

- Paul asked that all members of the group think about this topic and make suggestions.
- Gene also has offered to provide an outline of the evaluation model they use, which will be something we can follow and make additions to as needed. This will be an agenda topic for the next meeting but
- in the meantime we will circulate ideas, information and feedback via email.

**Action Item (BAR):** Paul will explore the possibility of doing a reshoot of the one video with low volume problem in time for the 2014 training.

**Action Item (BAR):** Suzette will look into the repetitive slide issues and get feedback from other County Directors. She will recommend specific revisions to eliminate the repetitiveness.

**Action Item (e-gov tools):** Maureen will compile a list with everyone's name and email address and send it out with the minutes.

**Action Item (Instructor Quals):** Paul will revise the draft document with the corrections the group agreed to and re-distribute it.

**Action item (ORPTS status):** Maureen will send a Term Date report to each county director and request assistance to contact towns who have not reported reappointment information back to ORPTS. October.

### Agenda Items

Mass Appraisal Review and feedback

Charter, Evaluation topic – more discussions

BAR – resources available for reshoot/sound issues

NYC Update

SLMS Steps/progress

Class Offerings

Training Status