

Real Property Tax Administration Committee

Minutes: June 9, 2016

Location: W.A. Harriman State Campus Building 9 (Albany County)

In Attendance

Assessors

- Patrick Duffy
- Todd Wiley
- Roger Tibbetts
- Teri Ross
- Warren Wheeler
- Curt Schoeberl
- Sue Otis

County Directors

- Laura Van Valkenburg
- Tim Murphy
- Suzette Booy
- Jay Franklin
- Tom Bloodgood
- Eric Axelsen

ORPTS

- Teresa Frank
- Joe Gerberg
- Tim Maher
- Susan Savage
- Geoff Gloak

Additional persons present

- Paul Miller
- Hannelore Smith
- Tobias Lake
- Commissioner Jerry Boone

Facilitator: Alan Kresge

Recorder: Jim McGovern

Get Organized

Previous minutes approved

Action Items

- RPS V4 Windows 10 compatibility – Mike Griffen has begun compatibility testing on Windows 10
- Agricultural primer update: The primer is available on the website
- State statutory updates: There has not yet been any feedback. This will be kept as an action item.

Suzette Booy asked that a letter reading be added to the agenda and it was.

Introduction

Susan Savage introduced DTF Commissioner Jerry Boone.

Commissioner Presentation

The Commissioner introduced himself to the attendees and had them do the same. He also detailed his background

The Commissioner spoke about his vision for the big picture

- Fiscal discipline (deficit reductions)
- Modernization of State government (efficiencies and redundancies)
- Best practices
- ORPTS integration (better job at DTF of integrating the operations of ORPTS)

The RFP for a new V5 system has been renewed. The project has a \$15 million budget. The first one failed because of a lack of vendor qualifications. Adjustments have been made so that hopefully vendors can now meet the qualifications.

He discussed how DTF can integrate existing resources into ORPTS. There is process management wisdom that can be applied by using managers from processing to assist ORPTS. Geoff Gloak will also now be working directly with ORPTS on improving communications with the assessment community.

Todd Wiley raised a concern over staffing decreases at ORPTS and that these result in ORPTS being unable to provide necessary services such as appraisal. He suggested that perhaps privatization of such services may be a solution.

Suzette Booy then read a letter to the Commissioner from the Assessors and County Directors that expressed their concerns with ORPTS. Issues were raised concerning communication, cooperation, and staffing.

Commissioner Boone thanked the group for raising their concerns and stated that he will take time to read the letter and then respond.

Legislative Update

Paul Miller gave a general update on end of session legislation and provided three handouts for the group. Specific mention was made of legislation concerning applying Cold War and Eligible Funds veterans exemptions to school taxes and the Westchester reval exemptions for Greenburgh and Ossining that phase in above average assessment increases.

Todd Wiley asked about the status of STAR Credit repeal legislation. Paul responded that there are currently two possible paths: a total repeal or a cleanup bill. The status of each option is currently very much up in the air. **(Update:** After this RPTAC meeting was held, the cleanup bill for the STAR Credit was subsequently passed and signed into law)

STAR Credit

Tim Maher presented on the new STAR Credit

The conversion of the STAR exemption into a credit was part of the 2016 budget. All new STAR applicants will be a part of the credit program. Homeowners with existing exemptions in their own name on the 2015 school tax bill will keep their exemptions until they purchased a new primary residence. Homeowners must register by July 1 to guarantee that they will receive their check in September. Homeowners can register later but their checks will be delayed past September. July 1 – August 1 will be the processing time and on August 1 Assessors will receive a list of check recipients.

Following the presentation, there was a discussion on various aspects of the new program. Tim provided answers to the questions that were raised. Up to date information on the STAR Credit is always available on the DTF website.

Tim reported that the RP-496 exemption renunciation form has been updated to reflect the fact that there is no fee to renounce the STAR exemption solely for the purpose of receiving the new credit.

Property Tax Freeze Credit

Tim Maher presented.

This is the third and final year of this credit. The Fall checks being sent out are for the 2nd year of municipal taxes that are covered under the program. Municipalities must be cap compliant and have efficiency plans in place.

If someone did not receive a check they should contact DTF. If their check amount was less than \$50, then it was not issued in contemplation of sending out with next check. Callers have the option of having the check sent out now or combined with the Property Tax Relief check.

This is also the 1st year of the Property Tax Relief check. Eligible owners must be STAR eligible and have incomes less than \$275,000. In the first year the check is a flat amount of \$185 upstate and \$130 downstate.

STAR Recoupment Letters

Approximately 6500 letters have been sent out to those who earned more than \$500,000 and received STAR in 2012 or 2013. The letter contains a bill for the amount of the benefit plus interest.

A discussion followed on the program. What happens with persons who receive a bill and did not receive the exemption? It was responded that homeowners can appeal to DTF if they believe the bill to be in error. Geoff was asked if a copy of the letter could be provided to local officials and he replied that it could be included in an email blast. It was also asked if a list of those who received bills could be provided and Joe replied that this could not be done due to income secrecy. Curt asked if NYS was partnering Florida with their homestead exemption to root out double dippers. Tim responded that there is no formal arrangement.

5217 Sales Scan

Tim Maher presented.

Kim Manley went to the County Directors meeting. Tim asked if there were any action items out of that and Tim responded that an email had been sent to Kim last week with their concerns. He added that he would like to see complete fill of the form to be mandatory. Tim asked if all County Directors would support that because of the implication of State mandates. There was discussion of this, but no consensus.

Enhancing Communication

Geoff Gloak and Laura Fallon presented

Geoff spoke of a new initiative and informed the group that he would now be re-engaged with ORPTS and working up a broad communication plan. He inquired as to whether the new weekly email was effective.

Looking at the brainstorming ideas gathered at the previous meeting, legal communication is a top issue. Joe is working on ways to improve legal communication. Looking at available tools to use, the idea of social media was raised. But drawbacks including banned use at work and non-use by many officials were raised. An idea to use the Assessment Community secure website to share information was suggested.

Todd raised the issue of being able to receive information about court decisions that affect assessment. He noted that Assessors need summaries and citations for their use locally. The ORPTS Reporter used to include such information, but Geoff responded that current staffing levels prevent the revival of that publication. It was suggested that Joe could determine cases that have statewide implications and those could be included in the email blast.

Laura asked if Assessors share information among themselves and the reply was yes. She suggested that input from Assessors can help drive the weekly email blast content.

Geoff asked about the effectiveness of Newsclips and was told that they are effective but are not always updated. He responded that would look into that.

Laura then spoke of the effectiveness of social media not just for officials but also for taxpayers. Likes and sharing can tell DTF what information people want to see.

Laura then had a PowerPoint presentation on website improvements. A data studio was held to assist with ideas. Eric and Todd were involved in that. The Property Owners section has been done and she asked for feedback. Group members responded with praise for the new design and some suggestions. The Assessor and County Director sections are next to be done. Laura asked for members to send her any input or ideas that they may have to assist in the process.

Feedback on the STAR palm cards was solicited. Responses included that the contact information should be bolded and that there should be more information about what to do.

Geoff asked the group if the STAR pamphlet was still necessary. There was no consensus on that, but it was suggested that all current pamphlets need to be reviewed

Wrap Up

Next meeting October 19 in the afternoon at Vernon Downs