

## **Training Governance Team Minutes**

June 26, 2006

Present: Jeff Bartholomew, Sally Cooney (Facilitator), Tom Frey, David Jackson, Cyndy Knox, Eugene Monaco, John Zukowski  
Guests: Don DeWitt, Maurice Kellman (NYC), Angelo Santoro (NYC)  
Additional Resources: Jim O’Keeffe, Maureen Wetter  
Recorder: Joan Wiech  
Absent: Nelson Bills, Tom Bloodgood, Suzette Booy, David Briggs, Cathy Conklin

### **Introductions**

The minutes from the meeting on March 22, 2006 will be revised to show that the draft rules for Assessors and County Directors will state that Assessment Administration will have to be retaken for certification if more than three years old and there will not be a limit on the other courses.

### **NYC Training Program**

*New York City- SUBPART 188-8:* The State Board approved the “emergency” rules for NYC at the April 28, 2006 State Board meeting. The “emergency” rules will expire in late July and the State Board will be asked to approve an extension of the “emergency” rules for another 3 months.

The NYC rules have been released by GORR and have been filed with the Department of State. Copies may have gone out on Friday, June 23, 2006. A Public Hearing is scheduled for July 24, 2006 in New York City. The period for public comment will expire on August 21, 2006. This information will be sent out on LISTSERV by Geoff Gloak.

The first of the training classes have been held in New York City. City Assessors completed training for IAAO Course 101 and Course 102 in May. The plan is to have the Assessors complete all courses by April 1, 2008. Fundamentals of Data Collection has been tentatively scheduled for July 19, 2006. In 2007, the City plans to offer the following IAAO courses: Advanced Income, Fundamentals of Mass Appraisal and Ethics. The last two courses, Assessment Administration and CAMA will be offered in February 2008.

The group discussed what options will be available for students that fail a course. The City will make time available for retesting if necessary. Equivalent courses are being considered by ORPS.

A question was asked about the difference in the requirements for NYC assessors and the requirements for the rest of the state. The answer was that the provisions in the existing program do not apply to New York City Assessors because of the complexity of the assessments being done in New York City. The Advanced Income and the CAMA

training courses are required for New York City assessors because they require a higher level of expertise to complete their assessment work.

New York City Finance Dept is taking the initiative for creating an Assessment Administration course for NYC. ORPS course training materials have been provided for review. ORPS will be involved in an approval process for this course. No progress to report yet.

An email was read to the group informing us that the NYC Finance Department will no longer be scheduling the training for the NYC Assessors. This decision was the result of a meeting that occurred with NYC Finance Dept. and the Local 1757 Assessor's Union on Friday, June 23, 2006. The scheduled training that was discussed earlier in today's meeting is uncertain. A decision will be made as to whether or not the Data Collection course will still be held. Further discussion will be necessary to determine what will happen with the new program. ORPS requested that the Finance Department inform them in writing/e-mail about their plans concerning assessor training.

Some concerns/questions that were expressed by the team:

1. Will the Union be taking responsibility to schedule the training?
2. What the costs are going to be?
3. Is it possible that an IAO exam can be available to take for certification? (Waiving the course of training)?
4. Do we need to start at the beginning?

ORPS may approve a waiver of the basic course of training for City assessors, as prescribed in RPTL, section 354 (b). Waivers are limited to those designations listed in the law. Approval is at ORPS discretion and is not automatic. There are a number of considerations: (work history, credentials, university attended, certificates, etc). ORPS will review applications upon written request.

For new City assessors (beginning on April 1, 2008 and later): Clarification was made that New York City Assessors need to be certified before they can be appointed to the position of assessor – under the current law.

### **Training Governance Charter**

Each member received a copy of the Assessment Administration Training Governance Group Charter. The first discussion was about the possibility of New York City appointing someone to be a member of the Training Governance Group. The team members felt that it wasn't necessary for NYC to have a member on the team but that sending them a guest invitation to the scheduled meetings would be the best solution. No change to the charter would be necessary to reflect this.

In the charter, on the subject area of Meetings, it was discussed whether it was necessary for the group to meet at least four times a year. The team agreed that four times a year wasn't necessary and the charter will be changed to state that the group will meet at least twice a year. This will be sent to all members and brought to a vote for the next meeting.

Next, a discussion on the Functions of the Governance Group in the subject area of Evaluation was held. The group discussed what was meant by: *the Group will prepare a report after its third year of existence and provide it to its constituents and to entities presenting training that are subject to evaluation.* Most felt that the report wasn't necessary at this time. The New Training Program would need to be in place before it can be evaluated. An evaluation system will also need to be in place, therefore the report mentioned earlier shouldn't become necessary until the new program has been put in place.

Decision: Since an amendment to the charter requires a vote of the members in attendance and a draft of the amendment to the other members prior to the meeting, a draft will be prepared and sent out to all members prior to the next meeting. A vote will take place at the next meeting.

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

*Assessors - SUBPART 188-2, County Directors - SUBPART 188-4:* The team reviewed and discussed the specific revisions that were made to the draft rules from the last meeting. The team agreed not to make any changes to the classification of the office of county director (188-4.2) at this time. The Directors may discuss this further with their membership.

Decision: The team members were comfortable with the revisions discussed and agreed that the draft is ready to be presented to the Governor's Office of Regulatory Reform (GORR) – after some minor changes are incorporated from today's meeting.

ORPS advised the group that a Basic Certification Requirement memo will be sent to all uncertified assessors and county directors. The purpose of the memo is to inform them about changes to the basic course of training for 2007 and encourage people to get certified before then. **(Note: This memo was mailed out on June 27.)**

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

*Assessors:* Cornell is set, applications have been coming in. Applications of Mass Appraisal, and an IAAO course will be offered. Enrollment is low for DOS courses at SUNY IT. R1 and G2 will be offered at Cornell. The Conference is just about complete. NYSAA also has had discussions with the Union about setting up IAO exams in the City.

*Directors:* The conference in July is set, registration is going well.

### **ORPS:**

- SUNYIT has 130 enrolled so far, all the courses scheduled by ORPS will be held.
- The new LCMS is set to go live in September. Everything has been approved and new servers, hardware and software have been purchased. Necessary accessibility adjustments are being made.
- 37 CE warning letters have gone out to assessors along with copies to county directors and CRMs.

- Basic certification reminder letters will go out again in the fall.

### **On-Going Course Development Work**

#### *ORPS:*

Assessment Administration: Course development will begin soon

Data Collection: Course is almost complete, case problems and exam are being worked on.

Assessor Orientation: Course development continues, will make accessible to County Directors for feedback.

Ethics: Everyone reviewed the KSA's that were sent out and a change on the Task #1 Page #1 in Conflict of Interest was made. Under knowledge needed, change Spouse to Relative and change Assessor extorting money to Assessor and County Director extorting money. The changes will be made and the course is set to move forward.

#### *NYSAA:*

Cost, Income and Market Approach to Value Course: Work on the course outline will begin soon, there is a lot of information to work with.

### **Upcoming Development Work**

Mass Appraisal: KSA Team – Joe Maciejewski will represent the County Directors and the Assessors will get back to Cyndy with names.

Introduction to Forest Appraisal – KSA Team – David Briggs, Roger Tibbetts will represent the Assessors. Bill Hotaling will represent the County Directors.

### **Next Meeting**

November 16, 2006

Albany/Syracuse

### **Agenda Items for Next Meeting**

Charter Revisions and vote

Status of Cost Income Course

Status of 2007 Rules

Status of Course Development

Status of New York City Rules and training program

### **Action Item Assignments**

Revision made to charter

Revisions made to 2007 rules (Assessor 188-2 and County Director 188-4)

2007 Rules to be sent to GORR

Continue course development work

How do we proceed with NYC training