

Training Governance Minutes – August 31, 2005

Present:

Syracuse: Jeff Bartholomew, Tom Bloodgood

Newburgh: Cathy Conklin, Sally Cooney, Tom Frey, David Jackson, Cyndy Knox (Facilitator), Eugene Monaco

Additional Resources: Jim O'Keeffe, Maureen Wetter

New York City guests: Stephen Bordanaro, Fadil Brijia, Maurice Kellman

Recorder: Joan Wiech

Absent: Nelson Bills, Suzette Booy, David Briggs, John Zukowski

Introductions

Suzette Booy has been reappointed to the Training Governance Group.

New York City

ORPS legal staff provided information on the New York City assessors and Chapter 139 of the Laws of 2005. Three agencies in New York City have assessors/appraisal personnel who appear to be covered by the statute. They are the Department of Finance, The Department of Law and The Tax Commission. Assessor titles within these departments that do appraisal work relating to Real Property Tax Administration will be required to become State certified. Provisional appointments will also be subject to the certification requirements.

Under the statute, the City assessors must meet minimum qualifications and will have two years to become State certified. It is likely that City assessors meet minimum qualification standards based on City civil service requirements. Many City assessors have taken training many years ago, but this coursework will need to be repeated if more than three years have elapsed. The City has proposed holding basic training classes in NYC in April.

The team discussed the Assessment Administration course for New York City Assessors. They felt that it will only be a 1-2 day course designed specifically for New York City. There will be additional requirements for those who do highly specialized work. New York City will need advanced valuation courses. Some components may reflect existing IAAO courses for advanced training. The team also discussed the possibility of a placement/proficiency exam.

ORPS staff will continue to discuss the issues with New York City over the next two weeks. The State Board of Real Property Services will be proposing amendments to 9 NYCRR to establish a program for the certification of New York City assessors as required by Title 3 of Article 3 of the Real Property Tax Law, as added by Chapter 139 of the Laws of 2005. Information on the proposal will be made available to all team members.

ORPS Strategic Plan (BAR & SCAR)

In relation to developing communication strategies, Jeff asked the team for ideas or improvements for the Board of Assessment Review and Small Claims Assessment Review Officer Training Programs.

Using course materials provided by ORPS, most County Directors set up programs to train BAR members and feel it is working well. It was suggested that the BAR Video be updated and the section on the seating arrangement be revised showing the assessor seated with the taxpayer and BAR, rather than at separate table - alone.

SCAR training: Some team members suggested there should be more formal training in place for this function. One idea was for them to sit in on the BAR training/video. The Office of Court Administration (who administers this program) has training videos on their website and Jeff will send the link to the team to review.

Training/Status/News

Assessors: 130 attended Cornell and it went very well. R-1, R-2 and G-1 had good attendance at SUNY. Grades have been sent to everyone who has paid. All courses have been approved for the Assessors Fall Conference. There were 16 students in the Train the Trainer course taught by John Zukowski and he is working on the grading process. The NYSAA is seeking CE approval for appraisers from DOS for some of their seminars. DOS is now requiring much more information than they have in the past.

ORPS: SUNY/Utica Summer Training went very well - 155 attended. The responses on the evaluations have all been good. The Assessment Administration course went very well.

The Tax Collection and Enforcement class has been scheduled for September 16, 2005 and will be taught by Jane Powers. Four uncertified Directors need the training.

Directors: Two-thirds of the County Directors attended the conference. Everything went well. It is time to plan the content for the winter Conference. There has not been any negative feedback from the county directors about teaching the mandatory ½ day of Assessor Orientation in the new 2007 program.

Ongoing Development Work

Assessment Administration Course and Data Collection Course – still working on the development of both courses. They will be sent out to the ORPS staff that are involved in the course first and then sent to the team members.

Cost, Income and Market Approach to Value Course - NYS Assessors Association trustees all agreed to take ownership of the valuation courses. They are working on course development.

Assessor Orientation – The team agreed that the current rules are liberal enough to require orientation within 30 days of taking office. Assessment Administration would not take the place of Orientation any longer. Development is ongoing.

Upcoming Development Work

Commercial/Industrial Valuation KSA's – plan to get started on developing KSA's for this course in October. The County Directors will look for a team member. ORPS has Richard Beatty, and Jeff Jordan. John Zukowski will also be working on the team. The Assessors have Nathan Gabbert and will work on getting another assessor.

Farm Appraisal KSA's – Plan to get started on developing KSA's in October. The County Directors have George Michaud on the team. ORPS has Mark Twentyman and Bob Wright. The Assessors plan to look for two members.

Governance Group Charter

An additional topic was discussed by the team members about New York City participating on the Governance Group. Some team members thought it was necessary to have NYC membership on the team and others thought that NYC could participate as guests.

Although NYC could provide a different set of dynamics, some team members did not feel that NYC would be interested in discussions pertaining to course requirements and course development for upstate assessors for the new 2007 program.

The current Charter would have to be changed to add a new member. This would require a vote with two-thirds of the members in attendance to approve. ORPS staff will speak with New York City about this issue. Jeff will draft an amendment and send it out to the team members to vote at the next meeting.

Action Items:

- ORPS staff will continue to work with New York City and draft proposed rule amendments in September
- ORPS will share NYC draft amendment with the team
- EdS will update the 2007 Proposed Program charts and post on the Governance Team website page and send out with the minutes
- Jeff will draft a change to the Gov. Team charter for distribution before the next meeting
- All team members will look at the current charter for other necessary changes and contact Jeff if other changes are needed

Next Meeting – November 4, 2005 – Syracuse and Newburgh – (10:00 – 3:00)