

Real Property Administration Training Governance Group Meeting

August 14, 2008

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

Resource: Jim O'Keeffe, MaureenWetter

Recorder: Joan Wiech

Absent: Nelson Bills, John Zukowski, Steve Child

Guest: Carey O'Brien

The minutes from the March 13, 2008 meeting have been posted to the website.

Introductions

The Future of the Training Governance Group/Charter Revisions

The team discussed the memo the Executive Director sent with regards to the expiration of the Training Governance Group Charter. ORPS explained that changes should be made to the charter, as it is revised, to clarify the future of the Training Governance Group and the member's roles and responsibilities. Since the Training Program is an ORPS responsibility, Lee felt that this is a good time to clarify his responsibility to the Training Governance Group. Lee will delegate the responsibility of Leadership of the group to Sally and the member's responsibilities are to provide advice and make recommendations to Sally. He does not expect the Training Governance group to make decisions. He plans to maintain the current membership and may add participants if he feels it is appropriate. He would like the group to discuss the memo and make recommendations to the draft revised Charter.

The County Directors and Assessors felt that the present Charter already states clearly that training is an ORPS responsibility. ORPS explained that since the Training Governance Group Charter was established by previous Leadership it should reflect the new Leadership as it is revised.

The team discussed the concern that Lee has with potential financial conflicts of interest. The Assessors didn't feel as though this is a problem. They feel their responsibility is to provide assistance to ORPS, as in course development, so that the best training possible is available to the assessment community. It is not their intention to benefit financially. ORPS stated that if team members are making decisions that benefit them financially, even though not intended, it is not ethical. The team also discussed copyright issues for the training courses that are being developed.

The team discussed Lee's authority to appoint and replace team members. Cathy stated that Lee is free to expand the group as he sees fit, although it will probably be less effective; however, representatives of the IAO or County Directors should be appointed by the representative group.

The team also discussed how often, if at all, they should meet. County Directors suggested that e-mail may be a sufficient way to communicate. It was also mentioned that the team could meet once a year or when there are important /new issues to be discussed.

The team agreed the Training Governance Group will continue to discuss the same type of issues they have in the past.

The team agreed the best way to handle the revisions of the Charter for the Training Governance Group is for ORPS to make revisions to the present charter and send to the team members for their comments.

Decision: ORPS will revise the charter and send it to the members for their comments.

Training Status / News / Misc. Topics

Assessors:

- Attendance at Cornell was very good; there were a number of new courses that went very well.
 - There were 24 enrolled in Valuation Course I.
 - Grades for the Valuation course were high because it now has an open book exam
 - There are still more revisions, but only a couple are content issues.
 - Overall the new courses went well, each had a lot of exercises that the students appreciated and they responded well to.
 - The time frame (hours & days) went as expected, some minor adjustments were noted.
- The new SPSS course taught by Bruce Sauter went very well – feedback was positive.
- The Data Collection certification requirement was fulfilled if the student attended all the sessions and passed both the residential and Commercial Data Collection exams.
- The Assessor's Fall Conference will be held at Hudson Valley Resort – Ethics training will be offered.

Directors:

- Attendance at the Conference was low (about 35).
- Conservation Easements and Sales Ratio Study were offered – (about 4 1/2 hours).
- Roundtable discussions on programs were held (about an hour).
- The Real Property IDA Presentation with Doug Barton went well.

ORPS:

- Summer Training at Utica went well - 219 instructors & students enrolled – all classes were held in one building.
 - Same assessors seem to be attending the Summer Training – a change of location was suggested.
 - One problem with a change of location is the availability of computer classrooms.
- RPS Courses – Issue with consistency of skill level – The Syracuse region tries to select students that meet specific criteria when enrolling in continuing education courses so those attending are at the same level.
- The County Directors requested a list of those who require Ethics training.
- An issue was raised that uncertified assessors are not getting reimbursed for RPS classes. RPS courses are not part of the basic course of training and, therefore, are considered continuing education. Certified assessors taking RPS courses are eligible to receive both CE credit and reimbursement. Uncertified assessors, however, must complete their basic course of training before becoming eligible for reimbursement for continuing education courses.

Conference Dates for 2009:

February 9, 10, 11 – County Director Conference/NYSAC - Albany

February 16, 17, 18 – Association of Towns – New York Hilton

Third week in July - Cornell

August 2 – 5 - County Director Summer Conference – Westchester County location to be announced

TBA – ORPS Summer Training School

September 27 – 30 NYSAA – Saratoga Hilton

Cost, Market and Income Approaches to Value, Ethics

The Valuation courses will be offered so that Course 1 is available prior to Course 2. (prerequisite).

Manfred and other vendors are offering R5, R6, R8 and R9, which have been approved by ORPS as satisfying the Cost, Market & Income component.

After the Fall Conference ORPS will get a good idea of who has completed their Ethics requirement and who has not.

Assessment Administration, Commercial/Industrial, Mass Appraisal

Assessment Administration was extended from a 5-day course to a 6-day course.

This is working well – (2 sessions) 3 days one week and 3 days the next week - 1 exam.

It was mentioned that it might be a good idea to offer the exam in two parts – one after each session.

The course also has an on-line pre-work assignment that benefits the student and the instructor.

There is an on-line version available for Assessment Administration.

IAAO Course 312 was approved to meet the Commercial/Industrial training requirement. Assessors are looking into developing other courses to meet this component.

The Mass Appraisal course has been revised. The June class was canceled because students lacked the prerequisite but the Mass Appraisal course scheduled for September will be held.

Tax Mapping, Tax Collection and Enforcement

This course will be offered to County Directors at the Winter Conference, February 2009. A list of County Directors who require this training was requested.

Commercial Data Collection Workshop

The Syracuse Regional office is interested in developing a 2-day Commercial Data Collection Workshop for ORPS staff who require more extensive training in Commercial Data Collection to get the skills needed to instruct the course. Assessors can also take the training to supplement the present course.

It doesn't make sense to add extensive training to the present course because not all students have the same needs, too overwhelming. Can be used for continuing education credit.

Different aspects of this course are covered in other courses, such as the Cost, Market and Income Approach to Value and the Valuation courses. We do not want to repeat information that is already being covered. As a continuing education course the focus should be more intense. If the regional office develops this course Educational Services will need to review it.

How is the New Program Working ?

Course registration is going well. There have not been enough course offerings to evaluate the program at this time. The program has only been underway for nine months and the team agreed to wait until after the program has been in place for at least a year before evaluating it.

A lot of effort has been put into the EDS computer system for the basic certification requirements. At this point there are still a lot of manual calculations necessary to keep track of certification requirements. More revisions to the system are necessary for it to track the Assessor/County Director Continuing Education Training Program and the New York City Assessor Training Program.

The team also discussed an evaluation form for the new program. Some considerations need to be noted when evaluating training courses such as the job, title, location and skill level of those being trained. Cyndy handed out a sample Follow-up Evaluation Form for the group to review. The thought was to send the form to the students about three months after the training to evaluate if the students have found the training useful in their day to day work.

The team discussed the present Continuing Education program. Some assessors feel they are repeating courses to meet the requirement. It was suggested that the required 24 credit hours per year could be reduced or at least evaluated. Some assessors have more training needs than others and municipalities deal with different issues. It has been the assessor's responsibility to take training that will benefit them in their municipality.

It is hoped that the BAR video may be reviewed and revised in time for 2009. However, if a revised version is not available at that time, the video will be made available in DVD format rather than videotape.

NYC Training Program Update/Rules

Draft rules to reflect the addition of NYC assessors working in the Tax Commission and Dept. of Law are currently undergoing review by GORR. We anticipate their approval shortly.

Action Items

Revise Charter and send to the team members

List of County Directors that require Tax Mapping, Tax Collection and Enforcement-completed and sent to Shirley Bement and David Jackson.

List of Assessors and County Directors that require Ethics training – completed and sent to Shirley Bement, David Jackson, Suzette Booy and ORPS CRM's.

Future Topics

Continuing Education Program

Revised Charter

Forestry Course

NYC Assessor Training Program

Next Meeting

October 29, 2008

10:00 am– 3:00 pm

Albany – 5th Floor