

## **Training Governance Group Meeting October 8, 2009**

Present: Christine Bannister, Shirley Bement, Suzette Booy, Cathy Conklin, Sally Cooney, David Hastings, Gene Monaco, Maureen Wetter (Facilitator), John Zukowski  
Others Attending: Sean Fitzsimmons, Phil Hawver, Tim Maher, Jim O'Keeffe  
Recorder: Joan Wiech  
Absent: Nelson Bills, David Briggs, Tom Frey

Minutes from the March 9, 2009 meeting have been posted to the website.

### **Commercial/Industrial Course**

The new Commercial/Industrial course is almost complete and ready to be sent to ORPS for course approval prior to offering it. It is planned to be scheduled at Cornell in July 2010. It is a combination of four seminars, totaling 24 hours, with a fifty question exam at the conclusion of the course. Presently there are thirteen County Directors who require this training. There will be 22 assessors who could take the course to satisfy their elective component, which is due in 2010.

As requested, John Zukowski will send Maureen a copy of the course materials for ORPS review.

### **Charter Review**

The Charter should be complete after the revisions discussed today are made. One change in relation to Membership is the representative group should not be New York State Assessors Association but instead the "Institute of Assessing Officers" and the IAO will appoint the three members. It was requested that the Charter include a statement that at least one representative from each of the constituent groups be present in order to have a quorum. In the Charter Amendment section, last paragraph, the word "This" should be corrected to "The". The group also discussed the inclusion of the comprehensive exam for certification in the Programs section on the first page, but mentioned it will be discussed later in the meeting. Jim will make revisions, and send the Charter to the entire team for review. He would like everyone to get back to him as soon as possible. If everyone is satisfied, he will get the appropriate signatures to complete the Charter.

### **Membership Terms**

The group discussed and revised the Membership of the Training Governance Group Chart.

David Hastings replaces Joe Maciejewski; Shirley Bement replaces David Jackson; Maureen Wetter replaces Cyndy Knox and Christine Bannister replaces Jeff Bartholomew. It will be recommended to Lee to reappoint John Zukowski. The group decided not to recommend Nelson Bills for reappointment since he has been unable to attend any of the meetings for quite some time and discussed some suggestions for a new at-large member. Recommendations/suggestions should be sent to Sally and she will discuss them with Lee. A revised chart is attached.

### **Proposed Rules/Minimum Qualification Standards/Reassessment Component Requirement**

The group discussed the advantages and disadvantages of increasing the minimum qualification standards for both assessors and County Directors. ORPS feels the qualification standards should be increased so when an official takes office they are able to perform their duties professionally and efficiently. Years ago, when the County Director minimum qualifications standards were written they were not specific to the job requirements/duties. Realistically, technology has changed how the duties for both assessors and County Directors are performed and a "higher level model" is necessary to be a professional in the field. The idea of a comprehensive exam that focuses on training, experience and getting certified quickly, like the IAO exam, would be the first step in achieving this. The group agrees that higher quality/professional assessors are important.

One concern expressed was the 5 year minimum experience requirement, which is the current IAO requirement for taking their comprehensive exam. There is a problem finding qualified assessors now. There are cases where the candidate selected has met qualifications, but really isn't the best choice for the job. Some assessor appointments are made by Town Boards without specific consideration to the job requirements. Another issue is whether the information provided on the application for qualifications review is accurate and complete. Sometimes getting clarification is difficult.

The group expressed concern about the ability of some assessors to pass an exam. Some assessors are highly qualified and motivated for the job of assessor but cannot pass exams. Many group members know quality assessors in this situation. Although this is a good means to measure the assessor's qualifications and abilities, having an exam requirement in place may limit the pool of qualified assessors. We also need to recognize that someone may be able to pass an exam but not be the right candidate for the job of assessor. Not everyone felt that an exam is an accurate means of measurement. Other concerns expressed were that the various designations identified in the draft rules are not equal in terms of required knowledge to be an assessor. Some designations or licenses focus solely on appraising property - i.e. fee appraisal rather than mass appraisal. It may be difficult to keep track of course requirements based on different designations that an assessor may hold. The group also discussed the importance of considering people who work for revaluation companies as being qualified for the job of assessor. Another long range proposal was for ORPS and the institutes to develop a way to get elected assessors, especially those without five years experience, trained and certified quickly. Many feel a County Director mentoring program should be in place providing an option for a Deputy Director (staff) to obtain a County Director appointment. Another idea mentioned was to prove mastery of subject matter by other criteria such as oral exams.

The group also discussed that as the qualification requirements for both assessors and County Directors are increased, ORPS staff should have to meet the same high standards.

In addition to the ethics component, ORPS is proposing a change to rules requiring a State certified assessor to be recertified upon reappointment or reelection by successfully completing a new reassessment component within one year. The reassessment requirement will take effect for an assessor beginning a term of office on or after January 1, 2011. (*the proposal now reflects a date of October 1, 2013*). Waivers will be considered. Based on comments he has heard from several assessors, Lee feels there is a need for this type of training. He would like this new training course (2-3 days in length) to provide a comprehensive program that teaches appointed and elected officials how to complete a reassessment in their municipality. The group suggested looking into the recently revised Mass Appraisal course as well as Assessment Administration and believes that most, if not all, of what should be considered in a reassessment course is already addressed in the basic course of training. Some of the members also did not agree that there is a need for this course in the continuing education program --- and certified assessors could retake some of the basic courses if they felt a need to. Although the agency's goal/priority is full value assessing, some of the team members felt that training Town Board members would be more productive than imposing an additional requirement on assessors.

It was questioned whether additional mandates are fiscally possible at this time for both ORPS and the municipalities. There may be manuals and other courses that may be useful instead of developing a new reassessment course. We need to consider available staff, reimbursement limitations and the budget.

ORPS representatives stated that the proposed rule change for the additional reassessment component will be presented to the State Board at the November meeting. Some group members feel this may be too soon but ORPS leadership feels strongly about moving in this direction.

Since the proposed changes to the minimum qualification rules will not be considered by the State board until sometime in the spring, it was suggested that a subgroup meet to discuss the proposed changes and make recommendations. The group should consist of one member from each organization. Each constituent group should get back to Sally within the next few weeks with the name of a participant. Cathy Conklin offered to represent the assessors on the subgroup.

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

#### Assessors:

- Cornell went well with 181 in attendance.
- Fall Conference had over 280 in attendance.
- Shirley Bement planned an excellent educational program.
- Roger Tibbetts has already started work for 2010 Cornell.
- Planning to cut back on overnight stay to keep spending/costs reasonable for Cornell.
- A new format for Cornell CE classes is planned:
  - 4-day, 24 CE credit classes
  - 2-day, 12 CE credit classes
- Conference in 2010 is planned at Lake Placid.

#### Directors:

- Thirty attendees at the County Director Conference in Westchester.
- Shirley did a great job; she mentioned it was difficult selecting courses for such a small group.
- Anne Sapienza instructed a Public Relations During a Reassessment course that went very well.
- David Hastings will be organizing this conference for 2010.
- Two Tax Collection & Tax Enforcement training courses were held this summer.
- Conference for October 2010 – scheduled to be in Syracuse (trying to keep costs down).
- Plan to offer the Tax Mapping course in the Spring 2010

#### ORPS:

- Regions have been conducting training on a local level
- DOB seems interested in resurrecting the Summer Training Program for 2010
- Fall training schedule has been posted to the EDS website

It was suggested that it may be a good time to address training for local Town Boards. Some feel assessments on rolls are not reflective of the economy and the Town Board member's lack of understanding of the issues needs to be addressed. There are presentations/seminars available but there isn't a required course specifically designed for Town Board members. It was mentioned that local governments may want to suggest/request such training at the Association of Towns meeting.

### **Budget Update**

DOB is very interested in how we are spending money and the approval process continues. Detailed justification is required for spending over \$500.00 and has to be submitted to the Division of Budget and State Operations for approval. The process can take several months. The requests for approval for the Cornell Seminar, County Directors Summer Conference and the Assessors Fall Conference were submitted in February and approved in late June. Appreciation was expressed for accomplishing this; it is reflected in the number that attended Cornell.

DOB would like ORPS to increase the number of courses offered on-line to reduce spending, especially for continuing education courses where reimbursement costs are high. Careful, cost effective consideration in selecting course /conference locations is necessary.

### **Continuing Education Rules/Update**

The group discussed the limit on banking continuing education credits. Maureen handed out a report that represents CE Credits at Maximum based on September 30, 2009. The numbers will change after the Fall Conference. She spoke about the communication plan in place for the next few months. This includes a plan to mail CE status reports to all certified assessors in November.

### **New York City Update**

There are 14 NYC Assessors remaining who require training (in the Tax Commission and Department of Law). There are two training classes scheduled, one in October 2009 and the other in January 2010. The Department of Finance has only a few assessors left to be certified. The State Board and DOB have approved non-compliance hearings for a few assessors in NYC's Department of Finance.

### **Basic Valuation/Ethics/Commercial/Industrial Courses**

Some assessors are having difficulty completing the Assessment Administration course. It appears they are overwhelmed with the amount of material being covered, in addition to the length of the course. This is especially true for new assessors, who make up most of the students taking this course. Although there are some failures, most are passing the 100 question exam. The Assessment Administration course was originally revised and lengthened (extensively) to make sure that Assessors are getting the information/training needed in the first year on the job. In most cases, the classroom course has been administered for three days one week and three days the following week with an exam. EDS will look into some ways to inform the assessor ahead of time that the course is extensive so they are prepared. The online Assessment Administration course could be lengthened to six weeks. EDS will continue to discuss alternatives prior to the next training schedule.

There are 68 assessors who still require the Cost, Market and Income Approach to Value course. There are 48 assessors who will soon be out of compliance for basic certification unless they complete courses this fall.

Work on the new Forest Appraisal course has not started and, currently, the Ray Brook office does not have anyone available who can devote the necessary time to assist with the development of the course.

### **Explore Alternatives for Reimbursement**

Currently the reimbursement structure for training is not meeting the needs of all municipalities. Most complaints are centered on the distribution of the funds - no matter how large the assessing unit is, reimbursement is only provided to the assessor. Towns with elected three-member boards receive reimbursement of training costs for each of the assessors, while appointed assessors in much larger towns receive reimbursement for only one individual. Ideally, solutions should be considerate of savings wherever possible but they need to be solutions that can be accomplished realistically.

One idea was to base reimbursement on the parcel count of a municipality - the larger the municipality, the more money allowed for training reimbursement. Another idea was to provide reimbursement of training costs for only one assessor in a municipality. There was concern expressed by some that the latter suggestion could be considered an unfunded mandate since all assessors have the same basic certification requirement, whether appointed or elected. Some municipalities may not have sufficient funds to pay for required training for their assessors.

### **Action Items/Next Steps:**

Revise and complete Charter for signatures

Reappointment of at-large member – John Zukowski (*the appointment of John Zukowski to another term has been approved by ORPS Executive Director*)

Provide suggestions to Sally for new at-large member

Organize small group for minimum qualifications standard review

**Agenda Items:**

Budget Update

Membership Terms

Proposed Rules

NYC Update

Reassessment component requirement

Minimum qualifications review

**Next Meeting:**

Wednesday, March 3, 2010

Location (videoconference):

5<sup>th</sup> Floor , Sheridan Ave, Albany and

Batavia office