

Training Advisory Group Meeting MINUTES
September 13, 2012 – Teleconference, Albany and Batavia

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Dan Martonis, Eugene Monaco, Paul Szwedo (Facilitator), Don Weber, Maureen Wetter, John Zukowski

Others Attending: Sean Fitzsimmons

Recorder: Joan Wiech

Absent: David Briggs, Nathan Gabbert

The minutes of the March 29, 2012 meeting have been posted to the website.

BAR Video/Powerpoint

ORPTS staff met with DTF Communications office staff to discuss production of a new BAR video. The communications staff agreed to assist in developing the new video. There was a lot of feedback from the Assessor survey and more analysis needs to be done.

The group discussed some of the topics they want to include in the new BAR video and addressed the questions that DTF staff had asked. Everyone agreed that the mock hearing is the most important/beneficial area of the training. The best approach for the video would be to have it divided into segments that the instructor/director can pause throughout the training session. The group agreed that a maximum of 20 minutes would be adequate for the video.

In addition to the new video, a power point presentation will also be developed.

Some topics that need to be addressed in the BAR training are: the swearing in process of BAR members and assessors, the set-up, who is allowed at the hearing, grounds for complaint, "Notice of Determination" form and the importance of organization.

Paul proposed that two sub-teams be formed, one for the video and one for the power point presentation. Representatives from ORPTS, assessors & County Directors should be on the sub-teams. Those interested can be part of one or both teams. The teams can decide what topics to feature in the video and what topics to feature in the presentation. Suzette and Cathy will seek volunteers for the sub-teams.

It was suggested to start with the old material/video and see what can be used, in some cases clarification may only be necessary. Some County Directors will forward their own training materials to Sean for review as a starting point. One idea was to show a "disaster meeting" in the video to point out what not to do. Another idea was to show two different versions of the meeting, one held correctly and one held incorrectly. Another perspective would be comparing the smaller and larger municipality's process. Stressing the importance of organization, reviewing the swearing in process, explaining public meetings, and emphasizing the grounds for complaint should also be included. It was also suggested that a Review Sheet Checklist would be a helpful tool.

The group also decided that the video should not be available to the public, but should have limited access.

Once DTF staff has more specific information they should be able to give us a tentative completion date.

It was agreed that the complaint form and determination forms could be improved but are beyond the scope of this project. It was suggested that a separate video for taxpayers on how to complete the complaint form could be useful and could be an alternative to a redesign of the form that would require legal involvement.

[Update: a subsequent meeting was held with Communications Office staff - it was advised that video segments be imbedded into the powerpoint slide show and it was explained that it would be too costly in time and resources to produce 2 videos to depict good & bad scenarios. Emphasis can be provided otherwise through the slides, instructor, or 1 video.]

Agricultural Training for CE Credit

A few questions were raised in a meeting between ORPTS and the Farm Bureau that relate to training.

Due to repeated flooding it's anticipated that soil productivity and values could change especially in Tioga, Oswego & Schoharie Counties. They also discussed the soil and water worksheet and whether the worksheet needs to be revised. There is a concern about the assessors being aware/trained. The training advisory group recognizes that ORPTS needs to know about this as well as the assessors. In response to the question as to how to inform the farming community about revisions, it was stated that the website should provide information and the Soil & Water Conservation office should send out broadcasts pertaining to this to all affected parties.

Another question is whether there is a need to offer Continuing Ed (CE) farm courses more often. It doesn't appear that there is a lack of offerings. There are CE courses available to assessors in 1 day – ½ week and full week sessions although the Ag Course at Cornell has been limited due to the lack of instructors. Assessors can request courses through their training coordinator in their region of the state. The coordinator initially schedules the training and then adds courses later, as needed. The coordinator also handles registration.

Filling Assessor Vacancies/Mentoring

There are concerns about the ability of municipalities to recruit new assessors – particularly in rural counties. One rural county expects to have one third of its assessor positions become vacant in September 2013 when 6 - year appointments expire. Small towns often offer low salaries and can face a lack of a qualified applicant pool as a result.

There is an option allowed in the training rules for county directors to provide a 6 month training program in assessment administration. ORPTS Ed Services can approve a 6 month training agreement between the town, county and new assessor who qualifies. The applicant must have a 4 year college degree and the County will need sufficient resources to sponsor and provide such a program.

Sharing one assessor between 5-6 smaller towns can resolve the low salary issue by making one full time position rather than several part time appointed assessor positions. A suggestion - small towns can work together to provide a benefit package to attract prospective assessors. This is especially needed at this time since it appears the public is demanding more of the assessor's time. It was mentioned that the County Assessors' Association is an asset and should be used to discuss these issues.

Ethics Recertification/ No CE Credit

As announced to the assessment community last month, Ethics recertification courses will be considered as basic training only. This issue was brought up at a RPTAC meeting and is now resolved. Continuing education credits will not be approved for ethics courses during the recertification 2 year window (October 2012-September 2014). This will leave the recently reduced 12 CE credit hours available for important /beneficial CE training. Assessors and county directors won't "use up" their valuable CE credits while taking the required basic ethics course. This is an advantage. Basic and ethics courses will be paid from reimbursement funds first, then CE payments will be made from the remainder. Assessors

expect the funds to be used quickly this year.

Note: ORPTS may approve CE credits for ethics training after the 6 year re- certification window lapses October 1, 2014.

NYC Training Update

New York City has hired approximately 36 assessors and 4 assessment staff since last year. City Assessors are required to become certified; ORPTS works with the City to ensure the training program is provided. The IAAO Course 101 was presented to their latest new group of assessors in August and the Ethics and the Assessor course was presented in September to new assessors who needed the course. The City has a new training liaison – who does an excellent job of coordinating between the City, the training providers and EdS staff. Courses have been well received. Tom Frey instructed all of the courses which has helped to keep the costs down. He commutes to their training facility in the City.

The City plans to develop specific material for Assessment Administration and Data Collection training for their assessors, using the ORPTS course materials as a starting point. ORPTS will make final approval before any course can be offered.

Mass Appraisal/Reassessment Course

The Mass Appraisal course materials have been improved and the course is ready to pilot. The group discussed the reasons why the newly developed course materials have not yet been presented in a classroom setting. The new course was scheduled for June, but because of low enrollment, it was canceled. Course was rescheduled for this November but has only one person enrolled [update – as of 9/27 there are 4 enrolled]. An observation: there are several online classes scheduled with exams offered in all regions and assessors seem to be taking the on-line version instead of classroom. An alternative was suggested to hold the course in another region where there may be more interest. EDS will talk with the Northern region and see if they would like to use the new material for their next scheduled classroom course – in March. It was suggested to limit online options in that region in that timeframe to encourage classroom attendance. Another idea was to combine the new Mass Appraisal course material into the on-line version without a classroom pilot. Maybe hold off for another year or so, when the need for this training will be more in demand.

Basic Training Status

NYSAA re-scheduled the September offering of the Commercial/ Industrial course for October in Syracuse [it's since been changed to November]. It was suggested that we should reach out to interested ORPTS employees for this training course. [Update -EdS recently sent the November course announcement to the regions.]

The basic Valuation Course 1 & 2 are scheduled Oct & Dec in Orange County. Starting this October, appointed assessors may take the Ethics course for recertification. Ethics courses are scheduled in Columbia County, Otsego County and in Lockport this fall. For their 2013 calendar, NYSAA plans to schedule one-day Ethics seminars in each region. More classes can also be added as needed. Ethics may possibly be offered at the conferences, too. (In the 2007-2008 Training year there were about 30 Ethics classes held.) There is a two- year window for all to complete this requirement, so there is time to schedule more ethics training.

Training Status/New/Misc Topics

Cathy was asked if the IAO has any future plan to develop on-line training courses. The IAO looked into on-line training several years ago but the cost was too high and it seemed impossible to implement at the time. The subject does keep coming up for discussion with the IAO. Cathy considers classroom training more advantageous.

Gene mentioned that the Statewide Learning Management System (SLMS) should eventually incorporate all local government. The momentum of consolidation into the SLMS is ongoing. Right now ORPTS has a 5 year contract for its online courses. By the time the SLMS is ready to incorporate our online courses, ORPTS may be near the end of the 5 year contract. ORPTS is already cleaning up and getting ready for this change. Basic cost for developing on-line training is \$10-15,000 and with extras it can be as much as \$40 – 50,000. Gene also mentioned that a webinar is not as expensive for training purposes, but a webinar format works best in a one hour to 90-minute timeframe.

Directors:

- County Director Conference is scheduled for October 15, 16 & 17 in Syracuse

Assessors:

- Assessor's Association Conference is scheduled for October 1, 2 & 3 in Lake Placid

ORPTS:

- Information on class offerings covered above. Schedule is posted on Training webpage through April.

Action Items

ORPTS will meet with DTF Communication Staff about new BAR video

County Directors and Assessors will get a volunteer for the 2 sub-teams

Sean will review County Director powerpoints for BAR training sessions

Sean will discuss using new Mass Appraisal materials with Northern region for their March class

Next Meeting, Agenda Items

Thursday, March 14, 2013 @ 10:00 am – 3:00 pm

Teleconference, Albany & Batavia

BAR Training Video and Power Point materials

New York City Training

Discuss Mass Appraisal classroom training course vs. online course

Ethics training course