

## **Training Advisory Group Meeting Minutes**

### **March 14, 2014 – Teleconference, Albany and Batavia**

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Nathan Gabbert, Pat Holland (New), Dan Martonis, Pat McVee, Eugene Monaco, Maureen Wetter (Facilitator)

Others Attending: Sean Fitzsimmons, Susan Gieryic (PDP)

Recorder: Joan Wiech

The minutes of the September meeting have been posted to the website.

<http://www.tax.ny.gov/research/property/assess/training/governance/index.htm>

There were technical problems with connecting the video conference, changed to teleconference.

### **Training Advisory Group Charter Review**

Pat Holland replaced Paul Szewdo, who retired from ORPTS in January 2014. For the Assessors, Cathy Conklin has been reappointed to the group, her term will expire in 2017.

Pat McVee will be leaving the group because she has been appointed County Director in Albany County. For the County Directors, Suzette Booy was reappointed and will send notification to the group. ORPTS approved the reappointment of at-large member Eugene Monaco. John Zukowski is up for reappointment in June.

Pat led the group in discussing the Charter and asked for comments and suggestions as to how to proceed with the Evaluation topic. Since significant changes have been made to the Training Program, the group felt it's time to formalize an evaluation process. Evaluating the whole program can be very complex. Presently, the students complete an evaluation at the end of each class. The revised program seems to be doing well. A more formalized evaluation process would measure the effectiveness of the program after the student has had a chance to apply it on the job. The charter calls for an annual report of the results of the evaluation. The group agreed that *annually prepare a report* should be changed to *periodically prepare a report*, providing the results to the Assistant Deputy Commissioner.

### **Instructor Qualifications**

The changes that were discussed at the last TG meeting in September have been made to the draft. Paul sent the revisions out to the group and Maureen asked if anyone has additional changes. It was suggested to add wording to the 4<sup>th</sup> bullet in the Ethics Instructors topic. The new wording is as follows: *In addition to the elements listed above, have a minimum of (1-2 years) (four sessions) as an instructor to demonstrate classroom management experience.*

These guidelines will be used as a mechanism to move forward with future new instructors.

**Action Item:** Maureen will send the finished document to the group but it will not be publically posted.

### **Evaluation of Training Program**

Susan Gieryic, Senior Research Scientist, from the Professional Development Program at Rockefeller College, University at Albany provided the group with a power point presentation of the Kirkpatrick 4 Level Evaluation Model used by PDP. She distributed a handout of the presentation and explained the 4 levels. The first 2 levels are less complicated and require less work to administer. Levels 3 & 4 require a lot more time and work to administer. First, you need to decide which level will work best. Once you know the level, you will be able to make decisions as to who you want to survey, timeframe, demographics, delivery, format and how many questions to ask. Most important of all, is asking the right question (s). Susan Gieryic has offered to assist us.

The group agreed that starting with a small group and only a few questions would keep the process manageable. It was suggested to start with the newly appointed assessors, since most of them need to begin with the basic course of training. One option would be to survey each year and ask if they are applying what they were taught in the training classes. It was also suggested to have a follow-up survey, maybe 45 days after the first survey. After each year in office, the training should become more valuable to them. Positive responses to the survey will show that the training program is cost effective.

The timing of the survey needs to be considered. Also, how will we deliver the survey to the student? Mailing it may not be in the budget. The group agreed that email is the best way to get the survey to the student and the Tax Department has an electronic survey mechanism that we've used to survey for BAR. It was also mentioned that April should be avoided since the month is very busy for Assessors. Another issue to consider is identifying who has completed the survey. It was suggested a person's name should be optional.

The group agreed to start with a small group of newly appointed assessors and see how well it works. They can expand the size if they feel they can manage it. Maureen and Sean will take a look at the number of new assessors to consider for the target group. October was suggested as a good time to send this out.

### **BAR Video/Powerpoint**

After the 2013 BAR season, a survey was sent to the County Directors. The responses were very positive. Issues concerning some repetitiveness, timing of the release and the volume on a segment of the video were mentioned. They plan to reshoot the segment of the video that had a volume problem on March 25, 2014. They plan to send materials out on April 1<sup>st</sup>. Suzette said she can make notes when she conducts her training this year. She will report to Sean where she thinks the material is repetitive.

Sean mentioned that they will add some new slides about the STAR Re-registration program, but no other changes are planned for this year.

The new GOV delivery system will be used to inform County Directors when the material is available. Also, Suzette said she can let the Directors know when it's available. Sean said they plan to survey the Directors again this year after the BAR training season ends.

### **Mass Appraisal and Reassessment Course**

Chris reported that the last Mass Appraisal training class was in July 2013. The region only plans to offer classroom training for this course. When scheduling the class they will include the Central Region. The On Line MassAppraisal course has not been revised with the new course material. Sean said they will update the on line course materials after the new version of Top Class has been installed.

### **NYC Training Update**

Classes have been scheduled for 22 new Assessors and Staff in the Department of Finance. Tom Frey was appointed the Chief Review Assessor in October 2013. Tom has been instructing classes in NYC. Course IAAO 101 was held in February 2014. Course IAAO 102 is scheduled in March 2014. Course IAAO 300 is tentatively scheduled for April 2014. Tom is also developing an Assessment Administration course for NYC Assessors, using ORPTS materials as a base.

### **Statewide Learning Management System**

The SLMS tracks training for the entire workforce. The State workforce was the first to be brought into this system. ORPTS has provided information that was requested. As mentioned earlier, the Top Class software is being updated. It is very user friendly and much faster. Our content will be next, but that will probably be more complicated. There will definitely be issues but we plan to keep our current system working until IT is ready to move forward.

### **Class Offerings**

Maureen received a request from an assessor to change the CE report so that the most recent training is listed first. The report has always shown the earliest training first and recent last. The group discussed this and agreed to leave the form as it is, changing it could do more harm than good.

As of today, 94.4 % of the statewide appointments (Appointed Assessors) have been reported. Maureen will send requests to County Directors for those reappointments that we have not received to date. There are about 204 assessors that require the Ethics course this year. A report was sent to Pat Duffy showing where Ethics training is required. There seems to be adequate Ethics training classes scheduled to accommodate those who require it. Maureen said she will send a copy of the report to Cathy and to the County Directors. She also plans to send a report for Cost, Market & Income Approach training to the NYSAA.

The new Training schedule will be available on ORPTS website next week.

Eleven County Directors need Commercial Industrial Approach to Value course which is not scheduled. The fall may be a good time to schedule this training.

Three County Directors need Tax Collection & Tax Mapping.

### **Next Meeting:**

Videoconference: Albany & Batavia.

DATE: Tuesday, September 23, 2014

### **Agenda**

Statewide Learning Management System (SLMS)  
 Bar Training Video and 2014 BAR Training Surveys  
 New York City Training  
 Evaluation of Training Program  
 Ethics training  
 Mass Appraisal course update  
 Training Needs  
 New topic – PDC/LOA course desired (Dan Martonis)