

Training Governance Minutes January 18, 2006

Present: Suzette Booy, Cathy Conklin, Sally Cooney, Tom Frey, Cyndy Knox, Eugene Monaco

Syracuse: Jeff Bartholomew (Facilitator), David Briggs, John Zukowski

Additional Resources: Jim O’Keeffe, Maureen Wetter

Recorder: Joan Wiech

Guest: Sean Fitzsimmons

Absent: Nelson Bills, Tom Bloodgood, David Jackson

Inclusion of Ethics in the New Program

The team agreed that the Ethics course will be required for Assessors and County Directors in the new training program. Since the Assessment Administration course included some Ethics training it will be taken out of that course and a new one day Ethics course will be developed. This will shorten the Assessment Administration course by one day making it a nine day course instead of ten days. Since the development of Assessment Administration hasn’t started, this should not be a problem.

The team thought that the Ethics course should be required for all new officials (elected and appointed) and re-elected and re-appointed officials (when they begin a new term).

The team discussed the content of the Ethics course and how it should be developed. The 2-day USPAP course does not fit the Assessors needs but there may be some parts of it that may be useful. It was mentioned that ethics and confidentiality, why it is necessary and the role that ethics plays in the assessment industry would be useful beginning topics for the course because it deals with general information. It was also mentioned that assessors may be able to assist in the development of this course and that NYSAA has a 3-hour version of this course planned for the fall conference that may be a good starting point. There are other courses available through GOER and there is a 7-hour USPAP update available that goes through a series of case studies on real life situations.

There were concerns about how the Ethics course will be presented.

Ethics is addressed in Article 18 – General Municipal Law and in the State Guidelines – Ethic Code (Public Officers & Public Employees). Municipalities may also have their own Ethics code and questions. In criminal investigations, the District Attorney rules.

The team discussed how to enforce the requirement. The suggestion was made that this should be required in the first year in office (similar to Orientation) and that it would be required for basic certification. With this discussion the issue of non-compliance raised some questions about administration, money, availability, removing assessors and county directors from office, losing certification and CE credit. Another discussion was whether certified assessors and county directors should get CE credit for taking the course. Most

felt that they would not get CE credit because it is going to be a basic certification and re-certification requirement. If an assessor is certified and then re-elected or reappointed the assessor would need to take the course within a year of re-election or reappointment. If not completed the assessor would be in non-compliance for basic certification. Another thought was to require 6 less CE credits for the year they need to retake the Ethics course but administratively this may be a problem.

It was mentioned that an on-line version of the Ethics course may be the best solution for availability. It would be convenient for the official (enter the course at their convenience), no travel expenses and it can be interactive (questions & discussions). If the on-line course requires an instructor we may have to set limits. In addition, we may be able to schedule classroom training in the regions each year and possibly schedule one day seminars at the various conferences.

The team received a list of questions EdS staff has regarding the administration of the Ethics course. The questions were reviewed briefly and responses provided to some. The assessors on the team do not want the IAAO or USPAP ethics course to be considered an equivalent. Since there are additional items that need to be addressed along with the issues already discussed at this meeting it was decided that a work team should be formed to handle the issues. It was also noted that this needs to be done as soon as possible so the proposed rules and regulations can be revised. After this work team has answered the questions, work on the KSA's can begin. The work team will consist of Maureen, Tom Frey, Jim O'Keeffe, John Zukowski and one County Director. (note: subsequent to the meeting it was determined by EdS staff that a meeting was not needed prior to drafting of rules. Draft rules will be submitted to team prior to March meeting.)

Governance Group Membership Teams

The following team members were reappointed for a 3 year term starting:

Jeff Bartholomew	2/2006
Nelson Bills	2/2006
Tom Frey	2/2006
David Jackson	2/2006

Training/News/Status

Assessors – Trustees have met and a full schedule is set for Cornell. The instructors are not confirmed yet but there are six ½ week courses, six full week courses, (including R-1 and G-2) and 24 one day seminars scheduled. The schedule for September/Lake Placid has been established. The Assessors' Association is planning on scheduling courses at SUNY Summer Training this year and also planning R1, R2 & G1 in April 2006 again.

ORPS -

- Distributed copies of the draft agendas for the County Directors/NYSAC Conference 2006 and the Association of Towns Conference in NYC. EDS will need outlines for all the courses.

- The new LCMS is an upgrade to TopClass and is expected to be implemented by early May. The two systems will run concurrently at first but the new system will have the ability of running courses 24/7.
- The New York City rules and regulations were filed with GORR and although it has passed the standard 6-8 weeks expected for approval or disapproval we have been assured that the final approval shouldn't take much longer. The next step will be the public hearing. Rules may be ready for the April State Board meeting.

Ongoing Development Work

Data Management - The team discussed whether the Data Management component should be included in the new program. It was decided that the course be eliminated from the program. The topics will be adequately covered in the other courses such as Assessment Administration, Data Collection, and the Valuation courses so we will no longer require a separate Data Management component.

Decision: The team agreed to eliminate the Data Management Component

Data Collection – course development is falling behind because loss of staff has created a gap in other areas that are a priority

Assessment Administration – the course development is at the beginning stages

Commercial/Industrial Valuation - KSA's almost complete

Farm Appraisal - KSA's almost complete

Assessor Orientation – course development not started

Forest Appraisal - not scheduled to be started until July 2006

- need to discuss sub-group for KSA's

Cost, Income and Market Approach - plans are to begin work on this course

The team discussed that there may be a problem completing the development of the courses by 2007. The loss of staff in EDS has created a slow down in the development stages of the courses. The one course developer has the additional responsibilities of the new LCMS and the SUNY Utica Summer Training School for 2006. We will need further discussion of what to do if we cannot complete course development.

Action Items

Work Team -Address questions about the Ethics course

Revise 2007 Proposed Program (Ethics)

ORPS staff will continue to work with NYC

County Directors to choose a representative for the Ethics work team

Agenda Items

Discuss contingency plan of what we will do if we can not meet 2007 deadline

Discuss questions & answers for administration of the Ethics component
Discuss KSA's sub-group for Forest Appraisal course
Update on course development (on-going)

Next Meeting

All team members meeting in Albany

March 22, 2006

10:00 am – 2:00 pm