

Training Governance Team Minutes

February 8, 2007

Present: Jeff Bartholomew, David Briggs, Cathy Conklin, Sally Cooney, Tom Frey, David Jackson, Cyndy Knox (Facilitator), Eugene Monaco, John Zukowski
Additional Resources: Karen Barrett, Sean Fitzsimmons, Phil Hawver, Jim O’Keeffe, Maureen Wetter
Recorder: Joan Wiech
Absent: Suzette Booy, Nelson Bills

Introductions

The minutes from the meeting on June 26, 2006 have been posted to the website.

Assessor and County Director Training Program

The rules for the basic course of training have been filed by the Board with GORR. Even though a new administration is in place they will go through the same procedure. This procedure is a two part process, first they go to GORR to be reviewed and then to the Secretary to the Governor and the Governor’s Counsel for review. As of today the rules have been reviewed by GORR and are proceeding to the next step.

NYC Training Program

The papers were filed in late January concerning the litigation with New York City. We have not been told of any scheduled arguments. Tom Frey requested that the NY Chapter of the IAAO be contacted to teach these classes that might be scheduled. It was mentioned that ORPS may be prohibited from talking to NYC union officials at this time because of the present court proceedings. The requirements for the New York City Assessors have remained the same.

Communication with Other Groups

In response to feedback received from the last RPTAC meeting, the team members discussed what communication should be taking place with other groups. It was reiterated that team members should routinely be reporting back to the groups they are representing. However, it was also mentioned that even though the Training Governance Group is not a RPTAC sub-committee that RPTAC still has an interest in being kept up to date on what is happening in the area of training.

Training Governance Charter

The team discussed the reporting requirement described in the section of the charter entitled “Functions of the Governance Group” under the Evaluation paragraph. The specific sentence under review reads as follows: *After the third year of existence, the group will prepare a report, and shall prepare such a report annually thereafter, concerning the results of its evaluations.* Based on the charter, the team should be preparing a report at this time; however, team members agreed that since we are still in the process of developing the new program it would be impossible to evaluate the effectiveness of the new program at this time. The team agreed that the evaluation process should occur after the new training program is in place for two years and then annually thereafter.

The team also reviewed another change to the charter that was discussed at the previous meeting in regard to meeting frequency. Under the section entitled “Meetings”, the first sentence will be changed to require meetings at least two times a year rather than four times. The team unanimously agreed to make this change.

Decision: All team members agreed that the charter should be revised to reflect the change relative to the timing of the Evaluation Report. The wording change will be presented to the team so voting can take place at the next meeting.

A revised version of the charter will be provided to all team members when the January 2007 minutes are sent.

Training/Status/News//Misc. Topics

Directors:

- The County Director Conference went very well and was attended by 40+ county directors.
- The Directors plan to offer the Tax Collection and Enforcement class this spring in the west.

Assessors:

- AOT (February 19 – 20, 2007) is all set, an agenda was handed out to the team.
- A very extensive schedule of one-day seminars has been put together. (24-26 one-day seminars)
- Cornell has been tentatively scheduled. There is an interest in the Western part of the state for the Farm Appraisal course. A request for ORPS training courses/ instructors will be directed to Sally Cooney.
- Roger Tibbetts is working on the fall conference agenda topics – should have excellent training.
- DOS Courses are planned for spring in Ithaca, (March - April), R-1, R-2, G-1; Tom Frey would like a list of assessors that require this training along with instructions on how to print labels.

ORPS:

- The Summer Training Conference is tentatively scheduled for July 29 – August 3, 2007- pending OSC approval.
- The LCMS has not gone live yet – waiting on integration – vendor is struggling with programming (user names & passwords). Still using old system.
- The new training schedule is set to go out early next week.

Ongoing Development Work

Assessment Administration – Cyndy and Sean are working on course development

Data Collection – complete – has been offered as a dry run a few times – will appear on the new schedule

Commercial/Industrial Valuation– no equivalents decided; needs more discussion

Assessor Orientation – complete – will be available when LCMS is available

Ethics – KSA's determined and handed out; outline is being worked on; NYSAA is working on development

Cost, Income and Market Approach – outline is complete and was handed out – please send comments by email to Tom Frey within the next two weeks. Things to consider - layout, sequence, missing information, unnecessary information etc. Also, if anyone has thoughts on

another title for this course please let Tom know. Tom hopes to have David Layne assist in developing the course after the outline has been approved.

Mass Appraisal - KSA's completed and distributed. Course development has begun with regional staff - Bob Roberts, Tom Schum, Bob Barnes

Tax Mapping– still need team members to represent ORPS and the County Directors to work on the KSA's for this course. KSA determination should be able to be accomplished via e-mail.

Tax Collection and Enforcement - still need team members to represent ORPS and the County Directors to work on the KSA's for this course. KSA determination should be able to be accomplished via e-mail.

Farm Appraisal - Mark Twentyman and Bob Wright are working on the Farm Appraisal course; should be available after October 2007.

Forest Appraisal – postponed until 2008 due to resource constraints.

The team requested an updated flowchart/timeline of the courses along with team members. Cyndy will provide the team with the status of all the courses.

Evaluation Report/Training Governance Charter

Before ending the meeting Cyndy read the proposed change to the Charter. The third sentence of the Evaluation paragraph under the Functions of Governance Group section will read as follows: *After the second year of the new training program's existence, the Group will prepare a report, and shall prepare such a report annually thereafter, concerning the results of its evaluations.*

ACTION ITEMS

Need Team members for the Tax Mapping and the Tax Collection and Enforcement courses (from ORPS & County Directors)

Status of course development for new training program (flowchart/outline) – (Cyndy)

Review and submit comments for Cost, Income and Market Approaches to Value course to Tom Frey - (team members)

Revisions to the Charter – (Cyndy)

List of assessors with training requirements/label information to Tom Frey – (Maureen)

AGENDA ITEMS FOR NEXT MEETING

Status of course development

Status of Rules

Status of New York City Training Program

NEXT MEETING

June 7, 2007

Albany / Syracuse

10:00 AM – 2:00 PM

Evaluation Report/Training Governance Charter

After the meeting ended, the team decided to hold a special meeting to vote on the revision to the charter that was presented to the team at the earlier meeting. The team voted and agreed to change the charter relative to the timeframe for preparing the Evaluation Report. Changes to the

charter will be made and the new charter will accompany the minutes and be posted on the internet.