

Training Governance Minutes – March 15, 2005

Present: Suzette Booy, Cathy Conklin, Sally Cooney (Facilitator), Tom Frey, David Jackson, Cyndy Knox, Eugene Monaco

Syracuse: Jeff Bartholomew, Tom Bloodgood, David Briggs, John Zukowski

Recorder: Joan Wiech

Absent: Nelson Bills

Minutes

Minutes for January 20, 2005 Training Governance Group Meeting were approved.

Assessment Administration

Cyndy handed out the New Program KSA's for the Assessment Administration course. She would like the team members to review it and get back to either her or Jeff with comments or suggestions. The next phase is to begin working on course development. The sub group members of this course have shown an interest in assisting in the course development.

Next, the team discussed the similarities between the Assessor Orientation course and the Assessment Administration course. The current rules allow Assessment Administration to fill the Orientation requirement. It was suggested that Orientation be a requirement for Assessors to take when they begin office and that it cannot be fulfilled by the Assessment Administration course. Currently, this course is an overview of the Assessor's job. It covers most topics briefly and introduces resources available to the assessor. In some cases, the County Director covers topics based on the specific needs of an assessor. There is a set of materials that the Directors use but the course was basically designed to give them flexibility. The length of the Assessor Orientation course is usually a half-day. Tom will summarize the materials being used and send them to the team for review. The team will discuss whether any changes need to be made to the present materials. No decision was made whether the Orientation course will continue to be required.

The plan is for the course development of Assessment Administration to begin immediately. It was suggested that team members use a critique sheet to review each function. On the critique sheet they can make notes of their concerns and also assign "expected times" for each function. The critique sheet will provide guidance to the course development team on what issues need more clarification. Someone will have to compile the information on the critique sheets and all team members will have to analyze it. John Z. will find a critique sheet that can be used and the team will begin working on the Assessment Administration course. The team agreed that this approach should be used for all courses.

There was concern expressed that the maintaining uniformity section will only include annual reassessment. The assessors felt strongly that towns that haven't reassessed in 20 years also need to maintain equity and they can run into problems with selective assessing. It was noted that an Assessor would need to know that different approaches

could create legal issues. It was agreed to include information regarding potential legal issues in this section of the curriculum.

Decision: The team agreed the course development of Assessment Administration would begin. Team members will use critique sheets to note their concerns relative to each function as they review the KSA's for the course.

Data Collection Course

The Data Collection KSA team came to a stumbling block in the development of the KSA's. An issue developed regarding the time to teach the collection of income and expense data. There was concern that there was not enough time to teach income and expense. The ultimate question for this governance group is "What is the goal of the data collection course?" The decision was that the goal was for the student to be able to collect the physical inventory of the property. It was agreed that since a final decision has not been made about the number of days required for the new Data Collection course the curriculum team will use the KSA's to help determine what is necessary.

The understanding is that the course will include:

- Collecting physical data - both residential and commercial
- A brief overview of Income and Expense - because it is on the data card

Note: There is a five-day Data Collection course that is given at Cornell by the Assessor's Association that works well and may be comparable.

Decision: The team agreed that as they work through the KSA's of the Data Collection course they will determine the number of days required and bring that back to the Governance Group.

Exam Requirements

A concern regarding the requirement of exams was brought up. Some team members feel that exams create a burden on the assessor since it puts their job and reimbursement at risk. Others feel that some courses, like Assessment Administration, require an exam because it helps eliminate those who do not have the ability to do the Assessor's job. They feel it is necessary to have some form of measurement in place. Some alternatives to exams would be to assign other requirements to pass a course such as: completion of manuals, attendance, participation and quizzes. Criteria would need to be set up so it is not subjective.

Decision: The team agreed that the exam requirement would be given consideration as they work through the KSA's and the course development.

Cost, Income and Market Approaches to Value

Cyndy has not been able to talk to anyone at the Appraisal Institute so Tom Frey offered to get a new catalog for her. She has reviewed Dearborn's textbooks and felt that the information was very good. They are continuing to work on forming a Valuation Course group.

Training/Status/News

Assessors: The conference in New York City went well. They sent out announcements that R-1, R-2 and G-1 will be offered in April at Ithaca. The response is very poor. Cornell is in the final stages and they will meet in April to finalize. They are planning three 1-day seminars at the conference in Rochester.

Directors: Winter Conference went well. The education committee is working on 8-9 topics for the Summer Conference.

ORPS: AOT went very well and we have been going through the comments on the evaluation forms. The Summer Training School at SUNY Utica is being planned and is scheduled for August 7 – 12, 2005. We still need to mention it is pending OSC approval. It was proposed to have a "Public Relations Week" and offer some courses relating to this. Powerful Presentations and Web Site Design were suggested. The Assessor's Association already has a Powerful Presentations course in September but our conference may attract a different set of students. A Web Design course would have to be basic and stay within the scope of the assessor's duties. Another possibility would be to combine the two courses and create one course.

Decision: The team agreed that a Public Relations Week at the Summer Training School in SUNY/Utica was a good idea to consider.

Action Items

John Zukowski will look into the critique sheets

Continue to work on forming a Valuation Course group

Tom Frey will supply a new catalog from the Appraisal Institute

Tom Bloodgood will summarize the Assessor Orientation materials and send out to team members

Curriculum Teams will begin work

Next Meeting

June 8, 2005

10:00 AM – 3:00 PM

Albany/Syracuse