

Training Governance Group Meeting March 9, 2009

Present: Jeff Bartholomew, Suzette Booy, Patricia Brede, David Briggs, Cathy Conklin, Sally Cooney (Facilitator), Tom Frey, Cyndy Knox, Gene Monaco, John Zukowski
Resource: Phil Hawver, Jim O’Keeffe, Maureen Wetter
Recorder: Joan Wiech
Absent: Shirley Bement, Nelson Bills

Minutes from the November 20, 2008 meeting have been posted to the website.

Charter Revisions

The group discussed their concerns about ORPS Executive Director appointing representatives for the organizations that are part of the Training Governance Group. Both the assessors and County Directors agreed they should appoint their own representatives. Lee feels that if he selects their representatives it will ensure that group members will not have an obligation to a specific organization. The assessors don’t feel they are representing NYSAA; they are representing assessors and the training issues involving assessors. Also, they are dedicated to providing training to the assessment community and feel they have provided ORPS with useful training options in the past and will continue to do so. They feel they can make the best decision as to who will be the most valuable to the governance group. Lee said the Executive Director has a statutory obligation to training and all issues concerning training. He feels he shouldn’t delegate this responsibility. It was mentioned that the group could make recommendations to Lee for appointments but some members thought that process may not resolve the problem. The assessors stated that this revision to the charter is pulling apart all that has been accomplished over several years.

The group members also discussed the governance groups voting process. It was suggested that when they cannot reach a consensus, they would present it to the Executive Director and inform the State Board they were not able to come to a consensus. This should eliminate compromising the Executive Director’s authority.

It was also mentioned that at large members will be appointed by the Executive Director. The Charter can only be amended by the Executive Director. The Charter will become effective when signed by the Executive Director. The terms of office for governance group members need to be discussed.

The group also discussed the conflict of interest issue concerning members on the governance group. The Chair of the Governance Group has the responsibility to make decisions as to whether there is a conflict of interest but it is each member’s obligation to disclose issues that may be potential conflicts of interest for both personal and organizational financial gain. It was suggested that it may be a good idea to write down detailed descriptions of concepts concerning questionable issues, circulate and discuss.

Decision: The Charter will be revised and sent to the governance group for discussion via email.

Rules-Minimum Qualification Standards

The latest version of the proposed rules to amend the minimum qualification standards for assessors was shared with the group. Changes were made to the proposed rules to reflect some of the points made by Team members at the last meeting. Some members commented that the qualification standards will be higher for assessors than for the County Directors. They felt that since the County Directors are supposed to advise the assessors that the minimum qualification standards should be comparable. It was explained that the minimum qualification standards are in place to ensure that qualified individuals are appointed as assessors. It was also stated that if these qualifications are accepted, a County Director who leaves his position as Director can be eligible for appointment as an assessor based on experience and certification. It was suggested that County Director qualifications be revised based on the proposed changes to minimum qualification standards for assessors. Members of the Training Governance Group who are county directors are asked to discuss this further with other directors.

Cyndy has been working on some aspects relating to the comprehensive exam. There hasn't been discussion on the make up of the exam. It was suggested there may be two exams: a comprehensive exam as referenced in statute and an exam to meet the requirement in the proposed rules for minimum qualification standards.

Rules-Continuing Education Requirement

The revisions were submitted to the Division of Budget for approval with an effective date of October 1, 2009. DOB has made it clear that even though a specific amount of money has been appropriated for training in the 2009/10 budget that DOB still has to approve any spending. ORPS is trying to facilitate the budget process and get blanket approval for many of the training courses so that we don't have to submit each assessor/county director reimbursement voucher separately. There is a concern that assessors and County Directors may not get reimbursed for conferences and may choose to not participate in these training opportunities.

We may not have money that can be carried over to the next year as we have in the past. The appropriated funds of \$350,000 for the training of upstate assessors and county directors hasn't always been enough. There may be leftover money from the funds appropriated for NYC, but we may not be able to spend it on assessors outside NYC. ORPS didn't realize a savings from the local assistance fund by canceling the SUNY Utica Summer training for 2009 because the funds for the conference did not come from the Local Assistance Fund, but rather from the agency's Non Personal Services money.

The group also discussed the annual continuing education requirement - too much or too little? We want to ensure that the money we have to spend is spent where it is needed most. It is important to concentrate on basic certification and manage the money effectively. Conference locations can make a big difference in the cost but the locations also need to be appropriate for training purposes.

Training Status, New / Misc. Topics

Directors:

- The winter conference went well and attendance was good. Topics were Public Speaking, Tax Mapping and Records Retention
- There are 12-13 uncertified County Directors that need training in Tax Collection & Enforcement and Commercial/Industrial Valuation
- The Summer Conference is planned for Westchester County

Assessors:

- 40 attended the Association of Towns Conference – it went well
- Topics were Land Tables (from paper to excel to Version 4), Non-Residential Exemptions, Records Retention, Small Claims and Article 47
- Valuation Course I is scheduled in Saratoga next week and Valuation Course II is scheduled in April, also in Saratoga
- The Cornell schedule is set with six full week and five half-week offerings. The Farm Appraisal course will be on the schedule. Also scheduled are IAO Courses, II and III, RPS V4 Valuation, Assessor Math and the two Appraisal courses.
- The Fall conference schedule is tentative

ORPS:

- EDS sent interim certificates to 77 Assessors and 7 County Directors, 18 consent orders to elected assessors and 2 consent orders for continuing education requirements.
- Those who haven't completed the Ethics requirement were given temporary certificates to allow more time for completing ethics recertification. (23).
- Projection of those who require Ethics training:
 - Basic Certification – 24
 - Temporary Certification – 22
 - Newly Appointed – 7
 - Re-elected Assessor – after 2010 – 90

NYC Update

Three more assessors were certified from the Finance Department which brings the total to 97 certified and 32 uncertified. In the Tax Commission and Law Department there are three certified and 13 uncertified. IAAO Course 101 was held in January 2009 for the Tax Commission and Law Department. IAAO Course 312 was held in March 2009 for the Department of Finance. There are plans to schedule more courses for the Tax Commission and Law Department.

It was noted that the classroom for the IAAO Course 101 was very small and there wasn't enough space for the students. The exam was difficult to administer in the limited space. The previous classroom was a better choice.

Assessment Administration has not been developed for NYC assessors. ORPS waived the Assessment Administration course for the Assessors in the Department of Finance

who had five years of assessment administration experience. Some Assessors who were lacking a year or two of experience were issued a temporary certificate until the course is available or they have five years of experience as an assessor.

Commercial/Industrial Valuation, Basic Valuation Courses

The County Directors expressed concern as to who needs the course. The IAAO course 312 isn't considered a good equivalent, it is strictly computer/statistics oriented. It was suggested that the two courses that John Zukowski has taught could be combined and an exam offered. EDS would need to review the outline for the two courses and compare it to the KSA's that were developed for the course and approve the exam. EDS would also like to review the course materials. Also, Tom and John would like the KSA's for the course.

Approval Process for Training Programs

All agencies are faced with limited spending. Any spending over \$500.00 has to be submitted to the Division of Budget and State Operations for approval. There is an urgency to know what will be approved but the process takes time and there are no guarantees. To reduce the number of individual requests that need to be submitted for approval, ORPS has submitted requests for the Cornell Seminar, County Directors Summer Conference and Assessors Fall Conference.

Action Items:

- Revise Charter and email to group members for discussion. (Done – Lee discussed revised charter with Tom Frey and David Jackson and asked them to share with their team members. Copies were sent by ORPS staff to at large members.)
- County Directors will review their minimum qualifications and report back to the governance group about revising qualifications to parallel proposed assessor minimum qualifications.
- Cyndy will send Commercial/Industrial KSA's to Tom Frey. (Done) Tom Frey and John Zukowski will develop Commercial/Industrial course materials and exam and send to EDS for approval.

Agenda Items:

Charter Revisions
NYC Assessor Training Program
At Large Membership
Budget Discussion

Next Meeting:

October 8, 2009 - Albany