

Training Advisory Group Meeting March 29, 2012 - Teleconference, Albany and Batavia

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Nathan Gabbert, Dan Martonis, Eugene Monaco, Paul Szwedo, Don Weber, Maureen Wetter (Facilitator)

Others Attending: Sean Fitzsimmons

Recorder: Joan Wiech

Absent: David Briggs, John Zukowski

The minutes from the March 2011 meeting have been posted to the website.

Training Advisory Group Appointments

Membership and terms are up to date.

Continuing Education Rules

The Continuing Education rules revision process is in the 45-day comment period. It began February 15, 2012 and will end on April 2, 2012. The handout lists the steps that will follow. Most comments have been received electronically, emails or letters attached to email. An Assessment of Public Comment needs to be drafted once the comment period ends. Before the rules can be adopted, the Assessment of Public Comment, any changes in the rule based on comments and adoption of the paperwork need to be approved by Counsel. Next step is the Commissioner Review, then rules and paperwork are submitted to the Department of State for Publication in the State Register. The rule is effective when adoption is published in the State Register.

Continuing Education Status Reports

Once adopted, the new rules will be effective beginning with the 2011 October training cycle. EDS has been working with IT services in making changes to the current computer system to accommodate the new rules. The continuing education status reports are being modified and will be emailed to the assessment community after rules are finalized and the computer system is ready. Posting CE credits has been on hold while the system is being tested. This does not affect the reimbursement process. Previous years training requirements remain at 24 CE credits.

It was questioned whether the training reports could be accessible for assessors and directors on-line. That may be something to be developed for the future, but for now Education Services will continue to email a training report to anyone who requests it.

Future of Training Advisory

The group discussed whether the Training Advisory group meetings should continue and how often the meetings need to be held. Cathy explained why the Training Advisory group was formed. She mentioned that the function was for the three groups to work together to establish the best programs for the assessment community. Over the years, working together they were able to reach goals, resulting in creating a new Basic Certification Program. She felt that the group was headed in the right direction by raising the training requirement for assessors and county directors but feels that the new rules reducing the requirement is not in the best interest of the assessment community. She explained that the assessor's job is more complicated than ever, and requires even more training to have the expertise to do the job. Reducing the training requirement is basically saying they don't need the training when in fact we know they do. A lot of discussions and work by many went into revising the rules to raise the training requirement and it seems that it was decided by leadership to reduce the training requirement instead. The group was not led to believe that leadership took their recommendations into consideration because they were not told of this decision prior to the notification at the RPTAC meeting. The group feels that they need to know where it stands with leadership and be assured they are not just wasting their time. Suzette was frustrated that work that went into changing the minimum quals was not adopted. She wants to feel that the work of the group is worthwhile. Nate questioned whether the group always worked toward consensus in the past – it seemed to change with Lee to be his way only. The group feels that if decisions are made, especially if it involves issues they are involved in, the group should be informed before anyone else. Paul took responsibility for communications and apologized for not communicating with this group before RPTAC.

The current Charter was reviewed page by page and all present agreed that it does indicate our direction and purpose. Since the changes in the structure of ORPTS, the group wants to be sure that they are moving in the right direction. To continue they need to be sure that leadership agrees and are considerate of the group. Paul mentioned that he shared a lot of information regarding the proposed rule change at the meeting last year. The group was not in agreement and that was conveyed to ORPTS management in an unbiased way. Minutes were drafted and then revised to reflect individual's comments. Paul, Maureen and Sean met with Susan Savage prior to this meeting to review the Charter. Susan is in agreement with the charter and supports the work of this group. Additionally, the group thought more discussion would be necessary as to whether they would meet twice a year, and when would be the best time to meet.

BAR Training

The group discussed the results of the questionnaire. It was explained that questions 1 & 2 were not about the BAR training but instead about name, location, etc. of those replying, so they were not included in the email.

According to the results, both the BAR Training video and power point presentations were considered to be helpful and useful forms of training.

The BAR training video definitely needs some revisions to continue to be a useful training presentation. Tax and Finance has the capabilities to produce videos and they seem open to the idea to create a new video or assist in revising the video. Any feedback from County Directors about this would be helpful. It was mentioned that Robin Johnson would be helpful in this area and Suzette would like to participate also.

The group agreed that working on power point presentations would be sensible and doable at this time. They also agreed that a BAR training video, set up in segments, would be most beneficial. The instructors/directors would be able to select the segments as needed, enabling them to incorporate the video into the training session along with power point presentations. It was also mentioned that the Job of the Assessor presentation is a good training tool, but it isn't certain if it's still available. The group discussed which segments would be the most beneficial. They agreed the mock hearings and grounds for complaint are the most important areas. Sean noted that Data Collection and Valuing Property were the less important aspects of BAR video as these are covered in different places (such as Job of the Assessor). It was suggested that maybe the assessors should be surveyed for their input as to where they feel their BAR members need training. They could be asked questions such as, what areas do you feel needs the most attention, what do you want BAR members to know, is the Evidence versus Sympathy role clear ("soft sell" - be more firm on this), what role the assessor plays in BAR, what does the taxpayer bring to the table, appraisal important but BAR members not the appraiser, is the Tax Consultants role clear, to mention a few. Before a survey can be sent to assessors it should be proposed to the County Directors for their input. Paul and Sean will work together on gathering some questions for the survey and report to the group. Suzette will contact the County Directors about the survey.

NYC Training Update

New York City recently hired 18 new assessors and a few staff who required training. Training was organized and completed in February and March 2012. Courses IAAO 101 & 102 went very well. ORPTS shared Data Collection and Assessment Administration course materials with the city. The city plans to use these as a base for creating courses for city assessors.

Mass Appraisal/Reassessment Course

Work was completed on strengthening the Mass Appraisal course and materials and it is now ready to be scheduled. Ann Sapienza and Chris Bannister are the instructors for the first session using the new materials. It is scheduled for June 12 – 14, 2012 and they hope to have a full class since that is very helpful in determining the timeline (3 days) of the training. EDS will send out notices (advertise) if necessary to get students enrolled who may need the course. EDS plans to incorporate the new training materials into the on-line course once we see whether any adjustments need to be made following the trial class.

Course Offerings

Five Ethics courses have been scheduled by the Assessor's Association. There will be about 200 assessors who require this training course due to the 2011 election year. And in 2013, over 500 appointed assessors will require the Ethics course due to new terms and new appointments. There are 26 who require the Market Value/Income Approach course, 5 directors and 12 assessors that require the Commercial Industrial course and there are 79 assessors who will require the Farm Appraisal course, 21 for this year. There is one Farm Appraisal course already scheduled this Fall and another that will also likely be scheduled in the Fall. Classes are typically scheduled in the Fall because it follows the prerequisite Cost / Market / Income class usually presented at Cornell in the summer.

Training Status/News/Misc Topics

Directors:

- The County Director Conference has been scheduled for October 15 – 17, 2012 in Syracuse

ORPTS:

- EDS has new software for grading exams since the old hardware reached end of life. This new software will generate answer sheets and provide analysis capabilities.

Some ORPTS managers met with the Farm Bureau. The Farm Bureau requested that soil values be reviewed as a consequence of repeated flooding in certain areas of the state and any changes be incorporated into training.

Assessors:

- Cornell is scheduled for July 16 -20, there will be 5 day courses and 2 & 4 day courses as well.
- The Assessor's Fall Conference is scheduled October 1 -3, Monday – Wednesday.
- The membership meeting will be held early Monday morning before the General Session at 9:00

Action Items

Sean will send the new Mass Appraisal course materials to the group

Suzette will contact Directors about the Assessors survey for BAR training feedback

Paul and Sean will gather some questions for the assessor questionnaire

In the future, it was agreed that if the group does not reach consensus, a formal statement will be written to reflect members' positions

Next Meeting and Agenda Items

Thursday , September 13, 2012, 10:00 am – 3:00 pm (Teleconference, Albany & Batavia)

Bar Training Video and Power Point materials

Look at results of the BAR survey from assessors

Discuss Charter

Progress of the Continuing Education rules

New York City training

Ethics training course

Discuss debut of the Mass Appraisal course

Discuss concerns of filling future assessors positions – mentoring program