

Training Advisory Group Meeting

March 24, 2011 – Teleconference, Albany and Batavia

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Nathan Gabbert, Steve Harris, Gene Monaco, Paul Szvedo (Facilitator), Maureen Wetter

Others Attending: Sean Fitzsimmons

Recorder: Joan Wiech

Absent: Shirley Bement, David Briggs, John Zukowski

The minutes from the September 2010 meeting have been posted to the website.

Training Advisory Group Appointments

Suzette and Cathy have been reappointed to their terms on the Training Advisory Group.

Apprenticeship Program

Mike Swan, Sue Otis and Maureen Wetter completed the draft Apprenticeship Program which is ready for review by the group. The program is itemized on a spreadsheet with a tab for assessors and a tab for county directors, identifying required duties as they occur by calendar month. It also lists “anytime” tasks, which are not specific to a month. These duties/tasks were gathered by reviewing the Assessors Calendar and other materials supplied by the group last fall. Cross-training is one of the components – where an assessor follows a county director through an actual process as it is performed. And likewise, the county director follows an assessor through the process of a task specific to their job.

It was questioned whether the program can be completed in less than three years. The answer was yes because there is a provision in rules for looking back to prior experience in fulfilling tasks. All participants will need approval by ORPTS before beginning the program.

The program will run for three years and will require a dated, formalized signature by the mentor, the applicant and their supervisor (the Agreement). The mentor will have the responsibility of updating the applicant’s progress by verifying their task completion dates. The applicant’s progress will be reported to ORPTS (electronically) each year for review.

At this point the next step is for the group to review the spreadsheet and get back to Maureen with additions and changes. She will email both the spreadsheet and the agreement form for the group’s review. Comments to be returned back to Maureen by the beginning of May.

In 2013 more County Directors are expected to retire and more positions will need to be filled. With “prior experience counting” county RPTS offices are hoping to have qualified Directors ready for appointment. ORPTS will continue to work on the rules with ORPTS Counsel’s Office and DTF and may need to clarify some language.

Proposed Rules-Minimum Qualification Standards

The group agreed that before the proposed rules can be presented to Counsel’s office for further review, we will wait for feedback on the Apprenticeship Program. Maureen will send it to group members and they can share with others that may offer helpful education/training comments. The county directors are concerned about the smaller municipalities and how this new apprenticeship program will affect them. They also expressed concern about whether a certified assessor is qualified to be appointed to a county director position. How much RPTS experience will they need and will the apprenticeship program cover this? Also, does a Residential Fee Appraiser have the experience to be appointed to an assessor or director position? There is concern with emphasis on appraisal background but no knowledge of real

property tax administration. The group discussed the Candidate for Assessor program. The new program has the same course requirements as the current program. Minimum experience qualifications are not required in the new version. Candidates need to complete the basic course of training to be certified as a candidate for assessor before they qualify for a sole appointed assessor position. It was questioned whether a GED is equivalent to a high school diploma. The answer in present practice is yes, but it doesn't seem to be clear in the rules. ORPTS will clarify with Legal whether this needs to be specifically stated in the rules.

Board of Assessment Review Training

Paul explained that several issues were explored to improve the BAR training process. ORPTS printing/shipping the BAR training materials to counties is not an option. One idea explored was to give BAR members access to the Training Portal /website so they can retrieve the materials and print it themselves. The problem with this option is the expense of getting so many BAR members licenses. The option of posting material without using the Training Portal is not possible either. The BAR manual needs to be on a "secure" website. Another idea was to provide the BAR members with a site to register and log into, but it would be overwhelming for ORPTS to process so many registration requests. ORPTS is in the process of migrating to DTF accounts, most of these options are not feasible at this time.

As requested by Directors, ORPTS posted an updated list of changes to the manual for 2010 and 2011 on the Training Portal. All material for 2011 BAR Training is available on the Training Portal – revised materials and new certificates of attendance. ORPTS did separate the BAR manual into separate documents that the Director can easily copy and email to members when necessary without having to provide the complete manual. It was mentioned that quite a few BAR members may not have email capabilities. Most directors will print manuals for their BAR members, some will email them using the .pdf document.

Paul reviewed the BAR training video and agreed that parts of it are outdated and it's time to update the dvd. He contacted Robin Johnson who was working with a Community College in her area to explore the possibility of creating a new BAR dvd for us as a school project. If this plan does not work out, Paul will explore DTF resources. DTF has resources available that could help us create a newer version --- some power point presentations and some video presentations – while eliminating outdated sections. We would use many of the original sections. Gene Monaco also mentioned that when funds are available, they have resources at Rockefeller College to create videos.

New York City Update

The Department of Finance has 114 certified assessors and 10 uncertified assessors. The IAAO 311 course was provided to assessors last September.

The Tax Commission and Law Department have 5 certified assessors and 8 uncertified assessors. The IAAO Course 300 Fund of Mass Appraisal was completed the week of January 24, 2011.

They continue to work on creating an Administrative Law Review and Assessment Proceedings course that would substitute for the Commercial/Industrial Modeling requirement.

EdS will survey NYC departments for new assessor appointments in March.

Reassessment Course Materials

The subgroup revised the reassessment course materials using most of the present materials and rewriting the course keeping "reassessment" the main topic. They felt that a 3-day course was sufficient to cover all the necessary topics. ORPTS will next review the revised course materials to ensure consistency. It was also mentioned that the exam may need some revisions. Sean will send the exam to the subgroup for their review. ORPTS will also plan to review the on-line version of the reassessment course materials in the near future. Chris Bannister and Anne Sapienza have volunteered to be the instructors for the "debut"

of the revised reassessment training course which may be scheduled for the fall of 2011. Once completed, the revised course will be sent to the group for review.

Continuing Education Rules: (suggested rule change to award CE credit for conducting a reassessment project) (TABLED)

Cathy spoke with the Trustees and the consensus was they do not feel assessors should be awarded continuing education credit for conducting a reassessment since this is part of their job.

Others felt that when doing a reassessment an assessor always learns something new, and in light of the continuing education requirement lessening, some thought this might provide more learning opportunities. If implemented, the CRM's would play a critical role in determining who is eligible for CE and number of CE earned. Ed Services would need input and follow-up as to whether people had earned credit and how many. Another question is how involved the County Director needs to be and who will keep track of the assessor conducting the reassessment. Paul proposed that without a high level of interest at this time, we should put the idea aside and keep the materials available for possible interest in the future.

Basic Valuation/Ethics/Commercial/Industrial Courses

Maureen reviewed the reports for assessor and county director training needs for scheduling purposes. At this time, there are 12 County Directors not certified, 43 Appointed assessors not certified and 69 Elected assessors not certified.

There are 13 County Directors who require the Commercial/Industrial course, 5 that require the Tax Mapping course and 6 that require Tax Collection and Tax Enforcement training. This number does not include vacant positions.

Presently there are 42 uncertified assessors and some assessors needing recertification that require the Ethics course. In addition, November 2011, 2 out of 3 elected assessors are running for election. There are 99 elected boards, each having two terms ending this year. There will be an increase of the number of assessors requiring the ethics course for re-certification or certification (about 200 assessors).

There are 71 assessors who require the Cost, Market and Income Approach to Value course: 21 – West, 13-South, 22-North 14-Central and 1-Metro.

John Zukowski will be teaching the Instructor Training class at Cornell. The Commercial /Industrial course will not be held at Cornell. The group discussed NYSAA providing a manual and offering a self study exam for the Commercial /Industrial course.

The Farm Appraisal course has been scheduled in both the Northern and Central regions for fall of 2011. Details are on the Training page. Bob Wright and Zach Kaiser are the instructors. It was questioned whether ORPTS had discussed or made a decision on allowing the Assessors Association to supplement additional Farm courses. Paul reported that ORPTS has had several discussions on this topic and concluded it is in everyone's best interest to have continuity in teaching the basic farm appraisal concepts. A few other options they are considering are County Directors and Assessors (with agriculture background) teaching along with ORPTS staff. ORPTS wants to continue to have their staff involved in the training since class discussions keep staff up to date on current events and issues. Bob Wright has been instructing the Farm Appraisal course for 10 years and has farming background in addition to his teaching experience.

Continuing Education Rules

Paul summarized the handout, *Reviewing the Continuing Education Requirements for Assessment Administrators*. He mentioned the recent article in the Watertown newspaper was incorrect and very confusing. It stated that the funds for assessor training were cut in half based on the fact that we have diminished the training requirement. He discussed the survey on page 3-4 summarizing the number of credits required from other professions and also the IAAO review of other states (latest available data is

from 2000). Paul will also look into getting the IAAO survey results from 2010, when that becomes available.

The group discussed the current rules requiring an average of 24 credits for continuing education annually. Assessment community members feel there is always something that can be learned by attending training regularly. IAAO recommends at least 30 credits hours yearly. Last year we spent a total of \$341,000 on training, basic (\$93,000) and continuing education (\$248,000). So far, this fiscal year, we have spent about \$70,000 on basic education and \$140,000 on continuing education totaling \$210,000. Totals are less this year because of an increased number of people who reached their CE credit banking maximum and therefore are not eligible. The rules provide that we pay basic first and then continuing education. The reimbursement formula is based on paying out ½ of the allocated funds in the 1st trimester, 1/3 of the funds in the 2nd trimester and 1/6 (remaining funds) in the last trimester. The formula was based on the fact that most training was taken early in the fiscal year. Some thought that we should revise the formula.

We had information that the Legislature was planning to allocate \$176,000 to training reimbursement (reducing funding by half). If this is the final amount, pro-rating CE payments will likely be necessary.

If funds are not allocated for training reimbursement ORPTS will still require, provide and approve training programs. Many options were discussed, but not all members support every option mentioned. Since the cost for continuing education reimbursement is the highest cost, it was suggested that maybe we could reduce CE requirements temporarily. It was also suggested to hold training more locally so the expenses are kept low, no travel expenses.

Another idea was to require less continuing education for long term assessors and require more training for newly appointed/elected assessors. Assessors Association thought they could solicit from the Assessment community what is needed and where so they can bring them their requests at a lower cost. They hope to provide a quality product at an affordable price set on a sliding scale based on number attending and location. More on-line training was also suggested because tuition is usually involved but no travel costs. Some thought that on-line training doesn't have the same quality as classroom training.

When asked if they would view maintaining the current 24 credits as an unfunded mandate, one committee member answered that they would not view it as an unfunded mandate. But another felt that it was no different than having to send out 2100 "undetermined" letters for the Basic STAR. It is an unfunded mandate as are so many additional functions being thrust on the local assessment offices. The only difference being that this one would provide a benefit to local government. Additionally, it was mentioned that reimbursement is likely an issue for smaller towns rather than a big town.

It was suggested to look into the last 5 years and see if there is a pattern where assessors didn't file for reimbursement. Most cases seem to be because the amount is so small.

It will be difficult for smaller municipalities to keep up with the present required continuing education requirement without state reimbursement. Some counties and towns cannot afford to pay for assessor training.

At this time, Assessors are finding their job more demanding. There are so many new developments (ie. Wind Farms), the assessors' job is more difficult. Because of this and in light of the public's interest in Real Property Tax, it doesn't appear to be a good time to diminish training requirements. More local training is needed to reduce the budget impact.

It was agreed the new ideas mentioned above and others, should be considered before diminishing the requirement for continuing education credit. Paul said the comments and ideas are appreciated and he will take them back to ORPTS management for further discussion.

Training Status/News/Misc Topics

Assessors:

- Cathy said the course schedule is almost complete for the upcoming fall conference, still working on the “general session” topic
- One day seminars are going well
- Cornell offerings are set for July
- An Ethics class was canceled due to lack of enrollment

Directors:

- Tim Murphy is working on the October Conference, nothing has been sent out

ORPTS:

- ORPTS is working with Roger Tibbetts on approving courses for Cornell
- ORPTS Training schedule for courses scheduled through October 2011 is available on the website

Instructor Training/Qualifications

The process for approving courses / instructors is covered in the rules – and all courses must be reviewed and approved by ORPTS for credit – this is true for all sponsoring organizations. Courses must be credit-worthy and instructors must be qualified by showing an expertise in the subject area and a demonstrated ability to teach. Several County Directors have applied to and been approved by ORPTS to provide selected CE training – examples are exemption admin and correction of errors. Every instructor needs training classes such as Public Speaking and Instructor Training. It was mentioned that the Instructor Training course should be required. There will be an instructor training course offered at Cornell this year this will provide a good opportunity for new Directors or others that want to train.

In some cases, the County Director will work with the CRM to conduct a training class. This is beneficial to those assessors to reduce travel costs.

Action Items/Next Steps:

- Maureen will send the group the Apprenticeship Program spreadsheet and Agreement Package in March (*done 3/31*)
- Interested assessors/county directors will provide feedback on the Apprenticeship program and Minimum qualifications by early May
- ORPTS will clarify some questions about the minimum qualifications rules with Legal
- ORPTS will send new Reassessment course materials to the group
- ORPTS will send Reassessment course exam to the group for review
- Paul will check to see if IAAO has updated their state survey for 2010.

Next Meeting: Teleconference - September 2011

Agenda Items:

Proposed Rules - Minimum Qualifications/Apprenticeship Program

NYC Update

Reassessment Course Materials

Continuing Education Rules

Basic Courses

BAR Training