

## **Training Advisory Group Meeting Minutes September 23, 2014 – Videoconference, Albany and Batavia**

Present: Christine Bannister, Suzette Booy, Cathy Conklin, Pat Holland, Dan Martonis, Eugene Monaco, Don Weber, Maureen Wetter (Facilitator), John Zukowski

Others Attending: Susan Gieryc (PDP)

Recorder: Joan Wiech

Video conference worked well; no technical issues.

The March 2014 minutes were accepted by the group and will be posted to the website.

### **Training Advisory Group Charter Review**

Maureen revised the Charter making the one change the group discussed at the last meeting. The word “annually” was changed to “periodically” in the Evaluation section of the charter. The group agreed the Charter is complete and ready to be signed. **Action item: Maureen - Obtain all signatures and post new charter on Training Advisory webpage.**

### **Evaluation of Training Program**

The group discussed the *draft* Training Program Survey. Using the EDS tracking system, Maureen was able to select a sample of about 200 people to survey. People who’ve completed Assessment Administration since January 2012 comprise the sample. There is a mix of certified and uncertified assessors and county directors. Local staff are also included.

The group agreed that name and county should not be required. The Survey Monkey is the software program we’ll use, which works with email. It was discussed that on-line assessments usually produce a much lower response rate. Normally, you will get about 10 – 15% who will respond; can be higher depending on what group is asking for the survey. Mailing the response is a better option. If it cannot be mailed, it is a good idea to send a follow-up email as “encouragement” to fill out the survey. Keeping a short timeframe for a response is also a good idea, about one week. Timing is also vital in getting the most out of a survey. The group discussed that the last week in October a good time to send the survey. It was suggested to inform those attending the October conferences that they may receive a survey and that it would be very helpful if they could fill it out and return it.

The group discussed several revisions to the draft survey.

- Question #3, the group thought the question should include the phrase “The best I remember are the classes that I have completed..

- Question #6 needs to be course specific, it should state that for the Assessment Administration course rate the following aspects. In addition, the group discussed that some of the statements should be revised to be less confusing and more relevant.

- Question # 7 may be difficult for the student to answer if they have not been able to apply the skills learned in their job at this point.

- Question #8 should be just a Yes or No answer. The group agreed that asking for an example might turn them away from the survey. The group feels open ended questions may not be the way to do this type of survey – especially if you don’t let them move on to the next without answering the question.

- Question #9, again was a time sensitive question, the student may not have had a chance to use these skills in their job.

- Question #10 was not necessary. Instead, #10 should state, *Please indicate the extent to which the training helped you perform the following Assessment Administration activities/elements on the job.*

We could include Valuation and Data Collection topics. The Survey Monkey will use specific criteria to sort the responses. **Action item: Maureen will work with Susan to revise the questions to get the most useful information from the survey.**

### **PDC/LOA Course**

The group discussed the difficulty some of the assessment community has understanding PDC/LOA. It was suggested that a class on this process would be beneficial to assessors. ORPTS staff will also benefit from the assessors having a better understanding of this process. There had been PDC/LOA training classes in the past but they have faded out over the years. Now there seems to be a need for it again. Some thoughts were to provide on-line training (Statewide Webinar) or one-day seminars at the conferences. Short presentations are a good idea, maybe each one centered on a specific topic so the assessor can choose what is needed for his particular municipality.

**Action item: Pat and Chris will look into these options.**

### **BAR Training**

Suzette reported that she received positive feedback from the Directors on the new BAR Training materials. The power point presentation had some repetitive information and she plans to report that to EDS. Both video and power point were used by many counties. Several counties only used the videos in addition to their own training materials. One county could not use the power point because the office did not have the computer system requirements. Note that the slide show can be customized for each county by the director. **Action item: Suzette will advise ORPTS as to which slide numbers are repetitive and need to be removed or revised.**

### **Mass Appraisal**

The Mass Appraisal training class was held in September in Batavia and Albany. The Batavia training class had ten students enrolled and the instructors thought that they did not need 3 full days to cover the material. The Albany training class had 15 students enrolled and the instructors thought the three days were necessary. The course is not being offered on the present training schedule (Nov- April) but the need for this training should increase in 2015. The class can be taken using the self-study format, which has been revised with the reassessment course material.

At this point the new Fund of Mass Appraisal training is only offered via classroom and self -study. When the technical resources and staff are available, the on-line version of the Mass Appraisal course will be re-designed using the updated course materials.

### **NYC Training Update**

Classes were held for NYC Assessors in June and August 2014. In June, 30 students attended IAAO 300 – Fundamentals of Mass Appraisal and in August 33 students attended IAAO 312 – Commercial/Industrial CAMA. NYC assessors still need both Assessment Administration and Data Collection. Development of a new Assessment Administration course is still in progress by the City. ORPTS staff have not received material for review for this new course as yet.

### **Statewide Learning Management System**

Overall, the Statewide Learning Management System is working well for the NYS side. Locality use is progressing slowly.

### **Class Offerings**

The new ORPTS training schedule will be released next week. It covers training from November 2014 through April 2015.

ORPTS thanked the Assessors' Association for arranging so many Ethics in the Assessor classes over the past two years. As a result, there were 936 assessors recertified. There are 47 assessors left who require recertification training and 12 new assessors needing ethics training in 2015.

For the 2019 recertification requirement, the group discussed ways to provide an Ethics course that is not repetitive to those who have already taken it. One suggestion was to make Part 1 (New) and Part 2 for (Recertification). The assessors will look into the issue.

Local government reporting of reappointments to ORPTS for the 10/1/2013 cycle is at 98%.

### **Training Status/New/Misc. Topics**

#### *Directors:*

- The County Director's Conference is scheduled for October 20 -22, 2014.
- CE discussions will include: Correction of Errors, Tax Foreclosures Municipal Options, Life Estates, Star, Legislation and Tax Freeze. Tax Mapping and Tax Collection for new directors.

#### *Assessors:*

- The Assessors' Conference will be held October 5 – 8, 2014.
- The topic for the general session is Legislation, Star Property and Tax Freeze.
- Valuing Distressed Properties one day may be changed. [Note: Residential Styles, Grade and Condition seminar has since been substituted in its place.]
- There will be 8 concurrent sessions, all are listed on the website.
- This year's conference was set up by Pat McVee.
- Cornell will offer Commercial and Industrial training and Agricultural Economics. The Ag course will include virtual farms tours, reporting on Amish Farming and address forms of Agriculture in NYS.

The Assessors' Association expressed frustration that the Farm Course scheduled in October in St. Lawrence County was canceled by ORPTS. The class was canceled because there were less than 10 enrolled and that is the minimum number needed to hold a training class. There were three Farm classes scheduled this year and two were held; one was canceled. Those in the October class needing the Farm for certification this year were offered a seat in the September Farm class.

#### *ORPTS:*

- As mentioned earlier, the new training schedule (November 2014 through April 2015) will be available on the ORPTS website next week.

Dan informed the group that Southern Tier West, a local government group that holds training for local government officials, expressed interest in hosting assessor training. Cathy suggested he contact Roger Tibbetts at the Assessor's Association.

### **Action Items:**

Get Charter signed and posted.  
Revise questions on the Survey and follow up.  
BAR video repeat slides review  
Look into options for training local officials in PDC/LOA

### **Next Meeting:**

Videoconference, Albany & Batavia.  
DATE: March 24, 2015

**Agenda Items**

Statewide Learning Management System (SLMS)

New York City Training

Evaluation of Training Program

Ethics training / Training needs

Not needed: Mass Appraisal, Charter