



# NEW YORK STATE ASSESSORS ASSOCIATION BULLETIN

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No. 5

## Scott Shedler, IAO Installed as 75th NYSAA President

Scott Shedler’s message at his installation ceremony was simple – challenge yourself to do better.

Shedler was named the 75th president of the New York State Assessors Association (NYSAA) in September 2019, and he shared that message during a moving speech following his swearing in. He has served NYSAA in a variety of capacities, but now that he has assumed the presidency his main objective is to challenge the NYSAA members to be better, to work together, and to achieve common goals in an effort to strengthen the organization.

“When you work together toward something greater than yourself, you find meaning and purpose,” said Shedler, who has overcome life-threatening health issues to reach his current position. “When you continue to place the team first, everyone benefits. I realize that sometimes our industry can be tedious and the process doesn’t always produce excitement or the results we desire.

“The fact remains, however, that you are alive and you have a calling to do something with the rest of your life starting now. The challenge is there. I have proven I can do it and so can all of our members. We can use our hearts, minds, and hands to build something bigger than ourselves. If you see something that doesn’t look correct in the process, don’t wait for someone else to fix it. Do it yourself and make a difference.”

Shedler said he looks to [football coach Rob Mendez for inspiration](#). Mendez has made a difference and so has Shedler, who has served as the assessor for the Town of Ramapo for many years in addition to his work with NYSSA. Shedler’s duties and responsibilities as assessor, along with his work with NYSSA, have given him a unique insight into the intricacies of the job, and now he hopes to make the kind of impression that will push his members to change the way they approach their jobs.

“Our time is now,” Shedler said. “The future belongs to those who prepare today. Prepare and work to do the impossible. Eleanor Roosevelt once said, ‘You must do the thing you think you cannot do.’ Be that person and do that thing. We live in service to our family, our churches, our town, and our county. We should focus that service on how many people we help each day and not how many likes we get on social media.”



Scott Shedler, IAO takes the oath of office on September 24, 2019 from President Rochelle Harris, IAO.

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## EDUCATIONAL CALENDAR

Please visit our website at [www.nyassessor.org](http://www.nyassessor.org) to register.

### Application of the Three Approaches to Value

Nov. 4-8, 2019

NYSAA Office, 116 Salina St., Suite 8,  
Liverpool, NY 13088

Instructor: Warren J. Wheeler, IAO

### IAO One-Day Seminar Valuation of Apartments & Condominiums

Friday, November 8, 2019

Columbia Greene Community College,  
Hudson, NY

Instructor: Edye McCarthy, IAO

### IAO One-Day Seminar Administration of Property Tax Exemptions

Friday, November 8, 2019

Ward O'Hara Agricultural Museum &  
Joseph F. Karpinski Senior Education Center,  
Auburn, NY

Instructor: Anne M. Sapienza, IAO

### IAO One-Day Seminar Valuation of Manufactured Home Parks

Friday, November 22, 2019

Quality Inn, Batavia, NY

Instructor: John Zukowski, IAO, MAI, SRA

### IAO One-Day Seminar Preparing for a Reassessment

Friday, December 6, 2019

Columbia Greene Community College,  
Hudson, NY

Instructors: Gary Link IAO and  
Edye McCarthy, IAO

### IAO One-Day Seminar Ethics for the Assessor

Friday, December 6, 2019

Corning Radisson Inn, Corning, NY

Instructor: John Zukowski, IAO, MAI, SRA

### IAO One-Day Seminar Ethics for the Assessor

Friday, December 13, 2019

Ward O'Hara Agricultural Museum & Joseph F.  
Karpinski Senior Education Center, Auburn, NY

Instructor: Anne M. Sapienza, IAO

Seminars are currently being planned for 2020. Please check future issues of the Bulletin and the NYSAA website for new offerings.

## 2020 CALENDAR OF EVENTS

NYSAA Executive Board and  
IAO Board of Trustees.....January 9-11, 2020  
Hampton Inn, Middletown, NY

NYSAA Executive Board and  
IAO Board of Trustees.....April 2-4, 2020  
NYSAA Office, 116 Salina St., Suite 8, Liverpool,  
NY

Cornell Seminar on Appraisal.....July 12-17, 2020  
Hotel Ithaca, Ithaca, NY

Annual Conference.....October 4-7, 2020  
Crowne Plaza, Lake Placid, NY

All NYSAA members are welcome to attend any meeting of the NYSAA Executive Board.

# Special Message



Rochelle Harris, IAO  
NYSAA Past President

As I am sure every single president before me has said, I cannot believe how fast this year has flown by. I thought that I would be so ready to give up this gavel and move on, but as the time got closer I became more and more melancholy about giving it up. I am relieved that I will be able to stay on the Board one more year as Past President, but it is time to pass on the gavel. I do not need to tell you that Scott Shedler, IAO is going to be an absolutely fantastic President to lead you all for the next year. His energy, passion, and knowledge cannot be matched, I am so excited to be part of his year, and I'm happy that I don't have to follow him as President!

I thoroughly enjoyed my work that I did for NYSAA and hope that my year as President will always be looked at as a success. I guess it's not bad that I can say bringing Warren as the executive director and Tracy as communications director on board, getting a new headquarters and training center, developing a new website, and bringing us to the beautiful Hotel Ithaca all happened under my watch!

I want to extend a special heartfelt thanks to every single Executive Board member for a job well done this year. I am surrounded by wonderful, Intelligent, and hardworking people that all started out as colleagues and fellow board members, but through our mutual care for NYSAA and the bond that occurs when we are all

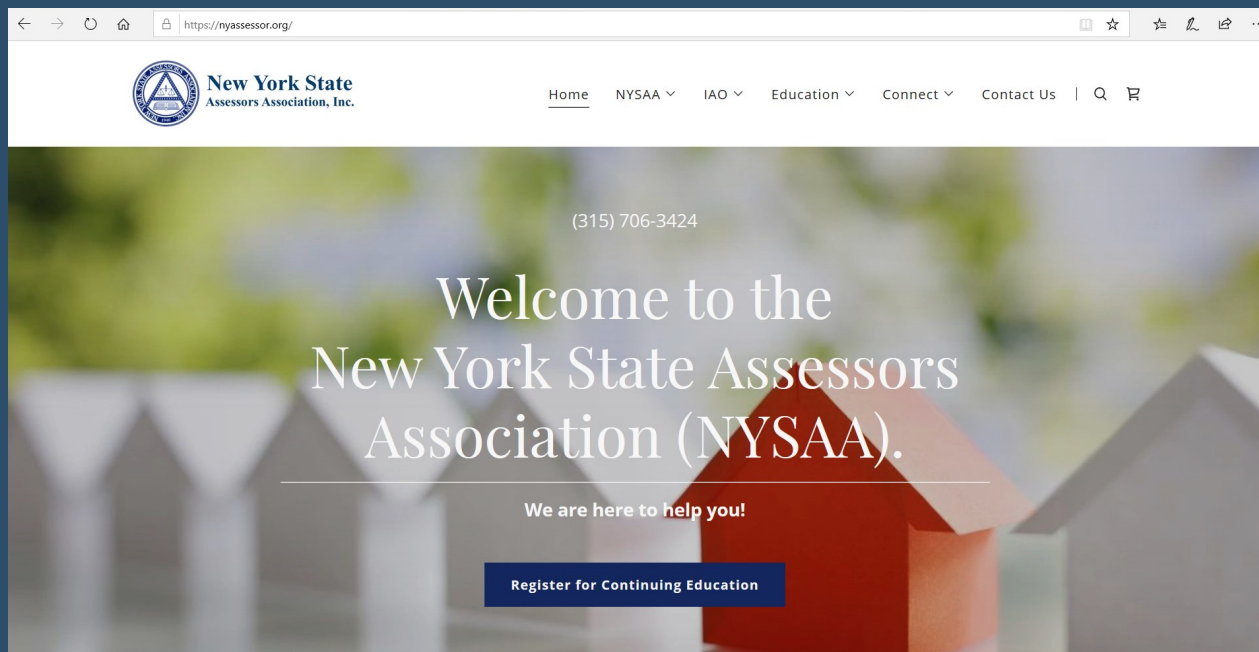
working towards the greater good, I am proud to call you all my friends. That is the actual pay for this - knowing that we as a collective group all worked together for you, our members, who put your trust in us to lead NYSAA to a better place.

I thank you all immensely for the opportunity to serve NYSAA and our profession.

Rochelle A. Harris, IAO, President 2018-2019

## NEW NYSAA WEBSITE!

NYSAA launched its first mobile-friendly website in October. If you haven't seen the new website yet, please take a few minutes to check it out. The URL is the same: [www.nyassessor.org](http://www.nyassessor.org).



# GIVING BACK

I was lucky to have been a member of NYSAA back when people like Jim Howarth, Robert Osias, Elliott Glasier, and others were the leaders of the Association and educators who taught us the way to value property and gave us the knowledge to be a professional.

At one time, Jim Howarth told me I should run for the Executive Board, and I responded that I had no agenda and he remarked, "You will." So I ran and became part of the leadership of the Association myself; much to my surprise I then became president of this great organization.

Like many presidents, when my time was up I still felt that I could contribute so I ran for IAO Trustee and over the 20 years served where needed but most remembered were the Chairmanships of One Day Seminars, Fall Conference, and then Dean of Cornell Education program. I worked diligently to provide great educational programs for the membership and the last 8 years served as the Chairman of the IAO Trustees, I might say a coveted position to attain.

During my Chairmanship of the IAO Trustees I worked with a dedicated group of Trustees who performed perfectly in creating highly acclaimed programs of education for both basic and continuing education needs serving not only assessors but county directors.

The greatest reward to me was working with the instructors who put together a number of great courses challenging our students and giving them what they requested. When these instructors were asked to come up with new material they responded and unless you have put together a course you don't understand the time and effort it takes to create the course and then teach it and ultimately allow other instructors to use the materials they created to teach the course around the state where needed. These are great people who deserve our thanks and I have always said that the Trustees and instructors made me look good as Chairman of the Trustees.

I was there to give back to the Association for the career I have and the professionalism I have tried to present as the Chairman of the IAO Trustees. Take time and give back as the rewards are many and the love and admiration coming from the membership will never be forgotten.

The reward of a Fellowship was a surprise I cannot help but cherish and I thank those who voted for me to receive this great recognition for giving back.

Sincerely;

Roger E. Tibbetts, FIAO



The members of the Institute of Assessing Officers voted unanimously to honor Roger Tibbetts with a Fellowship for his longtime service and leadership to the organization. Tom Frey, FIAO (right) presented the Fellowship to Roger at the awards dinner at the annual conference.



Roger Tibbetts, FIAO, with new IAO Chair Anne Sapienza, IAO.

# ANNUAL MEETING AND SEMINAR ON ASSESSMENT ADMINISTRATION

## 2019 NYSAA Annual Meeting Committee Reports

Editor's Note: These reports have been edited for space. Full reports are available by contacting Tracy Carman at [admin@nyassessor.org](mailto:admin@nyassessor.org)

### NYSAA President's Report Rochelle A. Harris, IAO

It is so hard to believe this year is over! It flew by so extremely fast, it seems so difficult to recap everything from the past year. This year was a whirlwind full of the highest of highs and some very lows. As I took the gavel last year, I was so excited to get started and make a difference, I was also so worried, I wanted to give it my all and not let anyone down, I knew I could give this position everything I have to give, but was worried my all may not be enough. My biggest fear is failure but as I look back now, I am so very proud of everything that we accomplished this year. I thoroughly enjoyed my work that I did for NYSAA and hope that my year as president will always be looked at as a success.

I am surrounded by wonderful, intelligent, and hardworking people that all started out as colleagues and fellow board members, but through our mutual care for NYSAA and the bond that occurs when we are all working towards the greater good, I am proud to call you all my friends. That is the actual pay for this - knowing that we as a collective group all worked together for you, our members, who put your trust in us to lead NYSAA to a better place. I thank you all immensely for the opportunity to serve NYSAA and our profession.

### NYSAA Executive Director's Report Warren J. Wheeler, IAO

Since our meeting in July, things have continued to progress. As you may recall, the new training center is still a work in progress. The new furniture was delivered and set up just prior to our very first educational offering (Fundamentals of Mass Appraisal) in August. On September 16, in conjunction with the Fund, we ordered an 86" interactive display monitor that will be the centerpiece of the educational center. Jeneen Hill and Christine Hayes were nice enough to take time out of their busy schedules to come down and assist in looking through the miscellaneous files that dated back to the inception of the organization. They have another day planned in the fall to finish the rest of the files.

### NYSAA Standing Committees

#### NYSAA Auditing Committee Andrea Nilon, FIAO, Chair

The 2018-2019 Auditing Committee consists of Deborah Eurich, IAO and Peggy Jenkins.

After reviewing the financial records of the New York State Assessors Association, the Way-Costello Memorial Education Fund, and New York State Chapter of the IAAO, the committee found no discrepancies and agreed that these accounts are accurately maintained and are presently in good order.

#### NYSAA Awards Committee Lloyd Tasch, IAO, Chair

The 2018-2019 Awards Committee consists of Thomas Donato, IAO; Jeneen Hill; Peggy Jenkins; Kimberli Johnston; and Denise Trudell, IAO.

I emailed the members of the committee throughout the past year. The Awards Committee met at the Hotel Ithaca and reviewed all the nominations and will be presenting seven awards at the Awards Banquet this evening. The committee would like to thank all the persons that nominated or sent a letter of recommendation for our deserving recipients.

## **Constitution & Bylaws Committee**

### **Michael Hartman, IAO, Chair**

The 2018-2019 Constitution & Bylaws Committee consists of Maggie Alix; Robert Criddle, IAO; Tracy Farrell; Christine Hayes; Cindy Shaw; and Walter Smead.

The Bylaws Committee has determined the following should be adopted into the NYSAA Bylaws under Article XII:

The NYSAA logo may be used to identify a member of the Association in good standing. The NYSAA logo may not be used to identify companies or groups that are not NYSAA member groups. The professional designation logos may only be used by designated NYSAA members in good standing.

The NYSAA logo may be used by NYSAA chapters in conjunction with chapter logos provided that the NYSAA logo remains unchanged and separate from chapter logos.

The NYSAA logo may appear on stationery and business cards of NYSAA members. NYSAA logos may not be incorporated as part of or assimilated into a business name, business logo, or corporate identity.

The logos may only be reproduced in the colors and formats provided by the Association.

The logos must not be altered except that they may be resized.

**Exceptions:** Any exception to these procedural rules requires express written permission of the NYSAA Executive Director.

Any violation of this logo use policy may result in remedial action.

## **NYSAA Employee Committee**

### **Lloyd Tasch, IAO, Chair**

The 2018-2019 Employee Committee includes Rob Bick, AIA; Christine Hayes; Jeneen Hill; Scott Shedler, IAO; and Roger Tibbetts, FIAO.

The Employee Committee was tasked with finding a new executive director when David and Susan Briggs announced their unexpected departure on October 12, 2018. The committee discussed, reviewed, and interviewed candidates and made a recommendation to the Executive Board before hiring Warren Wheeler, IAO. The committee then interviewed and made a recommendation to the Executive Board for the position of director of communications and hired Tracy Carman.

## **NYSAA Ethics Committee**

### **Jeneen Hill, Chair**

The 2018-2019 Ethics Committee consists of Maggie Alix; Thomas Donato, IAO; Patrick Duffy, IAO; James LeGrett; Teri Ross, IAO; and Lloyd Tasch, IAO.

Since the 2018 Annual Conference, the Ethics Committee received two complaints against two members of our Association.

After a thorough review of the alleged violations of the NYSAA Code of Ethics and Standards of Practice, and the comprehensive and detailed written response from the accused, the Ethics Committee unanimously found that there have been no violations and that the complaints were without merit and were dismissed.

## **NYSAA Legislative Committee**

### **Maggie Alix, Chair**

The 2018-2019 Legislative Committee consists of Rob Bick, AIA; Lisa Goree; Dylan Harris; Rochelle Harris, IAO; Jeneen Hill; Andrea Nilon, FIAO; Sue Otis, FIAO; Curt Schoeberl; Scott Shedler, IAO; Victoria Sirota, IAO; and Todd Wiley, IAO.

#### **October – December 2018**

ORPTS released the Mass Utility Ceiling Study. The committee teamed up with the Association of Towns (AOT) and worked to oppose state valuation of mass utility property. The committee submitted a Memo of Opposition, circulated an opposing resolution, and had a conference call with the Executive Deputy Commissioner of DTF. Fiber Optic Cable was ruled taxable. Two subcommittees were formed: RP-467 subcommittee and Dark Store subcommittee.

#### **January – March 2019**

The committee created a “How to Contact your State Representative Guide.” The committee drafted a testimony for the Public Hearing with the Joint Commission of Senate, Assembly and Real Property Tax Committee members that was presented by Warren J. Wheeler, IAO and Scott Shedler, IAO.

**April – July 2019**

The committee wrote a response to the changes to STAR for media release. The press release, along with many others written by fellow assessors, were picked up and published across the state.

At the end of the legislative session another mass utility bill appeared on the agenda. Right away, we drafted a letter in opposition, and the Westchester Assessors Association and AOT supported the memo. The memo was sent to all the members of the Rules Committee, and the bill was blocked from going to the floor and is tabled for now.

The committee wrote a Memo of Support for PILOTs – requiring that assessment reduction school impacts be delayed by a year. This bill did pass both the Assembly and the Senate and has been delivered to the Governor.

**July – September 2019**

Most recently the committee has been working on our legislative approach to the cycle bill. The cycle bill has been on the legislative agenda for decades and the association has always been in support. Recently there has been expressed concern about the feasibility of conducting annual or cyclical reassessment due to lack of funding, staff, experience, etc. The committee is reevaluating the approach.

On September 10, NYSAA was represented at a roundtable discussion held by Assemblywoman Galef for the purpose of discussing A8201, which would exempt all equipment used for transmission and switching of radio signals for the provision of commercial mobile radio service or mobile internet access service.

Throughout the year we were contacted by several state representatives for a legislative position. We gave our position on legislation that included Solar (RP-487), electronic submission of ag exemption forms, bank codes, and golf courses.

### **NYSAA Membership Committee Christine Hayes, Chair**

The 2018-2019 Membership Committee consists of Lori Barber; Rob Bick, AIA; Rae-Lynn Dussault; Michael Hartman, IAO; Jill Lederhausen; Molly MacElroy; Kelly Miller; William Purtell, IAO; Scott Shedler, IAO; and Karen Van Wegenen.

There is a total of 53 new members for the past year. Thirty-two members were pulled from the list for nonpayment of dues, which leaves us a total of 827 NYSAA members.

### **NYSAA Memorial Committee Tom Donato, IAO, Chair**

The 2018-2019 Memorial Committee consists of Michael Hartman, IAO. During my tenure as committee chairperson of the Memorial Committee, it has been my sad responsibility to notify our Association of the passing of 11 long-time members. This is one committee that I wish the report could say “We have nothing to report,” but we all know that is not reality. Unfortunately, as time goes on, we will all lose good friends, but our memories of them and the stories we tell will keep their presence with us forever.

Randy Deal – 9/13/2018 – Town of Cayutaville  
 Nicholas Morabito III – 10/12/2018 – Towns of Perinton & East Rochester  
 Robert Leavitt – Town of Williamson  
 Sandy Galus – 1/4/2019 – Town of Montgomery  
 Bill H. Kleis – 1/29/2019 – Town of Boston  
 Agnes Winn – 2/5/2019 – Town of Augusta  
 Joan Dowdell – 6/10/2019 – Town of Ogden  
 Sandra Smith – 7/2/2019  
 James Maloney, IAO – 7/11/19 – Towns of Kingston and Ulster  
 Ronald Garropy- 9/4/2019 – Town of Fleming  
 Ruby A. Bruce – 9/13/2019 – Town of Colden

### **NYSAA Mentoring Committee Rob Bick, AIA, Chair**

The 2018-2019 Mentoring Committee consists of Maggie Alix; Jay Franklin, IAO; Christine Hayes; Vicki Hayner, IAO; Sue Otis, FIAO; Teri Ross, IAO; Cindy Shaw; and Rebecca Speno.

I have had two contacts this quarter in regard to mentoring, one from a new assessor and one from a new office employee. They have both been sent the standard packet of information.

I reached out to my committee in early August asking for input towards the creation of a recruitment/informative pamphlet that President Harris and I have discussed creating. The idea has roots in the aging demographic of the profession, with more assessors over the age of 65 than under the age of 50, thus creating a need to recruit new assessors into the fold.

**NYSAA Public Relations Committee  
Jeneen Hill, Chair**

The 2018-2019 Public Relations Committee consists of Tom Donato, IAO; Vicky Hayner, IAO; Michele Jordan; James LeGrett; Molly MacElroy; Dave Marrano, SCA; Jill Murphy; Lloyd Tasch, IAO; and Kandy Wittmeyer.

We were given the task of creating a succession plan brochure to hand out to local officials. We took on the task, and the brochure was created by February to be distributed at the Association of Towns conference in NYC. We also provided profiles for the Bulletin this year. Dave Marrano, Roger Pigeon, and Jill Murphy's profiles were submitted.

**Select Committee Reports**

**Annual Conference Committee  
Teri Ross, IAO, Chair**

The 2018-2019 Annual Conference Committee consists of Lori Barber; Christine Hayes; Joanne Majewski, IAO; Susan Otis, FIAO; Walter Smead; and Roger Tibbetts, FIAO.

The committee would like to express our gratitude to the Westchester and Putnam County's Assessor Associations for very generously donating the excess proceeds from selling ads in the program to the Conference Committee to offset some of the costs for the conference "extras."

**Assessment Tools & Technology Committee  
Thomas Donato, IAO, Chair**

The 2018-2019 Assessment Tools & Technology Committee consists of Michael Hartman, IAO; Mary Kern; Van B. Krzywicki; Dennine Leeson; Joanne Majewski, IAO; Kelly Miller; and Brian Phelps, IAO.

Under direction of President Harris, our committee's first task was to evaluate the Association's website. This project was accelerated with the resignation of our executive director. Besides all the user issues that were brought to my attention, there were internal website management processes that were left unknown and needed to be figured out by the new Board. By February, we entered into a contract with GoDaddy to host and design a new, more user-friendly website. The committee is looking forward to end-user feedback so we can make the site as user friendly as possible.

New for this conference is a cloud-based scheduling app. I first saw this type of app last year when one of our past presidents showed me the app the IAAO used for their recent conference. It was really cool, enabling all conference attendees, at a phone's distance away, to know exactly what was going on when and where.

**Current Issues Committee  
Scott Shedler, IAO, Chair**

The 2018-2019 Current Issues Committee consists of Lori Barber; Tracy Farrell; Karen Futia; Christine Hayes; Dennine Leeson; Joanne Majewski; John Noto, IAO; and William Purtell, IAO.

The committee created a document to assist assessors with the audit process. This was after the chair traveled the state and spoke to assessors and auditors as well as other key stakeholders. The final draft was created via Joomag and was sent out for review. Once completed it may be sent out to the membership. The committee also interacted with the Legislative Committee.

**Real Property Tax Administration Committee (RPTAC)  
J. Todd Wiley, IAO, Chair**

The 2018-2019 RPTAC Committee consists of Rochelle Harris, IAO; Scott Shedler, IAO; Lloyd Tasch, IAO; Roger Tibbetts, FIAO; Warren J. Wheeler, IAO; and alternates Curt Schoeberl and Susan Otis, FIAO.

Meetings were held On October 17, 2018; January 28, 2019; and June 20, 2019. Our next meeting is October 7, 2019 in Albany. Primary topics discussed include legislation, tax relief checks & STAR credit checks, mandatory IVP, preventing STAR fraud & abuse, training, RPSV5/ACES, solar court cases, and many more.

It is noted that based on meeting discussions at RPTAC, the 2019-2020 state budget included a provision that adds a new section 1211 to the RPTL that streamlines the equalization process. Beginning with the 2019 equalization rates, if ORPTS confirms the assessor's stated level of assessment (LOA), the LOA will become the final equalization rate.



**John H. Way – John M. Costello Memorial Education Fund  
Robert Criddle, IAO, Chair**

The 2018-2019 trustees are Patrick Duffy, IAO; James Molinaro, IAO; Timothy Sheares, IAO; and Denise Spaulding, IAO.

The Fund trustees have been very busy since last year's fall conference working with the Association and IAO Board of Trustees to support and advance the Fund's educational mission. This work included the following:

- Agreed to provide 85% of the cost to rebuild the NYSAA website, not to exceed \$6,000, with the understanding that a digital education calendar will be developed and integrated into the website in place of the former paper calendar.
- Proposed an amendment to the Fund's Constitution and Bylaws authorizing the executive director or their designee to keep the minutes of all meetings of the Fund. Prior to this, there was no formal provision for keeping minutes. The Board of Trustees of the Fund and the NYSAA Executive Board approved the amendment.
- Completed an initial analysis of the vendor procurement process and the fee structure for fall conference vendors to determine if greater revenues and efficiencies can be obtained. This work is ongoing.
- Approved a request from the NYSAA Executive Board and IAO Board of Trustees for funding for the new John H. Way – John M. Costello Memorial Educational Fund Training Center located at the new NYSAA office in Liverpool, New York. The training center will include an 86" interactive display system and greatly enhance and expand the delivery of educational opportunities for the membership!

I am pleased to report that Fund, which is celebrating its 35<sup>th</sup> year, continues to be very strong financially under the professional guidance provided by our advisors at Merrill Lynch and the sound stewardship of the trustees. The 50/50 raffles, fall conference vendor booths, Fund Raffle Table, and Bulletin ads all help to promote quality education at one-day seminars, Cornell Seminar on Appraising, and the current Annual Seminar on Assessment Administration here in Lake Placid.

Twelve scholarship winners attended Cornell in July. The fall conference has four scholarship winners in attendance.

### **IAO Committee Reports**

#### **IAO Chairman's Report Roger Tibbetts, FIAO**

Cornell was a great success as reviewed in the critique sheets from all the classes, and Edye did a tremendous job of putting together a great program for our first venue at Hotel Ithaca.

As requested by Training Advisory and from the needs analysis we hosted the Mass Appraisal course August 21st-23rd with 15 students in our new office classroom, and we plan to hold more classes this year in Liverpool.

This being my last meeting with you prior to the IAO Annual Meeting and Luncheon on Tuesday I want to thank all of you for your work towards our goals, and it has been a pleasure working with you these past years. I will cherish the memories and friendship we have shared and wish you good luck in the future. On Tuesday after the Annual Meeting you will meet with the newly elected Trustees and choose a chairman for a 2-year term, and I want to say choose carefully because it is a challenge and requires perseverance and great attention to detail working with Warren and Tracy to be sure everything is in place for every event.

#### **Seminar on Appraising Edye McCarty, IAO, Dean**

As chairman of Cornell Seminar, I am elated to report that we had a very successful 2019 educational seminar at Cornell.

We had an excellent selection of instructors this year as we do every year. With the courses that were offered and the draw from the instructors, I am pleased to report another very successful year. I have enclosed the final report for Cornell along with the list of course attendees.

Appraisal Principles and Procedures, 29; Application of the Three Approaches to Value, 22; Fundamentals of Data Collection, 12; IAO-2 Exemption Administration, 9; RPS V-4, 21; Advanced Farm Valuation, 25; ft; Advanced Application of the Three Approaches to Value, 16; Valuation of Strip Malls, 15; Red Flags to Property Defects and the Effects on Value, 36; Gas Stations and C-Store Valuation, 35; Amish and Other Non-Electric Property Valuation, 25. The total student count was 245.

We need to ensure our students obtain the best educational opportunities, so I ask our Trustees, instructors and, most important, our membership for their input as to which courses to offer.

## **One Day Seminar Larry Quinn, IAO, Chair**

The 2018-2019 seminar coordinators are Robert Criddle, IAO; Dennis Ketcham, IAO; William Purtell, IAO; Denise Trudell, IAO; and myself.

To date there are 16 one-days being offered in 2019, eight of which are the Ethics class. Seven classes have been held thus far with 182 attendees. Additional Ethics courses will be added if needed.

## **Ethics and Bylaws Teri Ross, IAO, Chair**

The 2018-2019 Ethics and Bylaws Committee members are Thomas Donato, IAO; Andrea Nilon, FIAO; Timothy Sheares, IAO; Lloyd Tasch, IAO; and Stephen Teele, IAO.

Please (see below) the proposed amendments to the IAO Constitution and By-laws to be voted on by the membership.

One IAO Ethics complaint was filed in July. This committee reviewed the complaint, as well as the accused's response, and has unanimously determined that there were no ethics violations perpetrated by the accused. It is our recommendation that the full Board of IAO Trustees approve the committee's decision and then the accused and accuser will be notified of that decision.

Proposed Amendment to the IAO Constitution and Bylaws.

At its April meeting, the IAO Trustees voted to accept the proposed amendment below (in red) to the IAO Constitution and By-Laws. In accordance with ARTICLE XI - AMENDMENTS, this amendment is presented to the IAO members for their consideration. This proposed amendment will be voted on by the IAO membership via IAO election ballot.

Original version:

ARTICLE V Election of Trustees Section 1. New trustees shall be elected in accordance with the following procedure:

- a. The chairman shall appoint a nominating committee composed of five members not more than two of whom shall be trustees and none of whom shall be members from the same county or city.
- b. Forty days prior to the time of the annual meeting the Chairman shall cause to be distributed to each member by any means, including electronically, an official ballot showing the nominations of the nominating committee for each office and a space for alternates.
- c. In order that a ballot be valid, all regulations must be complied with.
- d. The polls shall close at the end of the thirty days following the date of the election notice. The ballots will be tabulated by three tellers appointed by the chairman.

Proposed amendment:

Section 1. New trustees shall be elected in accordance with the following procedure:

- a. The chairman shall appoint a nominating committee composed of five members not more than two of whom shall be trustees and none of whom shall be members from the same county or city.

**b. Any member of the Institute in good standing may submit an application, available from the Executive Director, to be nominated to serve on the Board of Trustees. All applications must be received by the nominating committee with a postmark no later than June 1st of each year. The nominating committee shall notify all applicants of their decision by June 15th of each year.**

**c. Any IAO member that timely filed an application and is not recommended by the nominating committee may file a petition to be added to the ballot. A petition, available from the Executive Director, signed by at least 15 current IAO members in good standing must be submitted to the nominating committee by August 1st of each year. A maximum of 5 signatures can come from a single County. The nominating committee will review petitions for validity and notify the Executive Director of their findings.**

d. Forty days prior to the time of the annual meeting the Chairman shall cause to be distributed to each member by any means including electronically, an official ballot showing the nominations of the nominating committee for each office and a space for alternates.

e. In order that a ballot be valid, all regulations must be complied with.

f. The polls shall close at the end of the thirty days following the date of the election notice. The ballots will be tabulated by three tellers appointed by the chairman.

**Examination Committee**  
**Thomas Frey, FIAO, Chair**

The 2018-2019 Examination Committee members are David W. Briggs, FIAO; Deborah A. Eurich, IAO; Edye B. McCarthy, IAO; Teri L. Ross, IAO; and Timothy A. Sheares, IAO.

The Exam Committee held two exams this year, one in Greenburgh, Westchester County, and the other at the Cornell Seminar, Ithaca, Tompkins County. A total of 13 applicants sat for the exam and four candidates were successful in completing the exam requirements. The four candidates that have been recommended for membership by the Exam Committee are Tracy Farrell, City of Lockport; Michael Fouassier, New York City; Mary Beth Murphy, Westchester County; and Jenna Pettas, City of Long Beach.

**Program & Technology Development Committee**  
**Dennis Ketcham, IAO, Chair**

The 2018-2019 Program & Technology Development Committee members: Thomas Donato, IAO; William Purtell, IAO; and Denise J. Trudell, IAO.

Our largest technological topic continues to be the website. A beta version of the new website was released to us over the summer, I've seen little comment made. We are anticipating that the IAO will be doing electronic voting next year, pending a bylaw change. I also just learned that there is now an online schedule for our conference that can be accessed via mobile phone.

**Awards Committee**  
**Dennis Ketcham, IAO, Chair**

The 2018-2019 Awards Committee members are Thomas Frey, FIAO; Andrea Nilon, FIAO; Susan Otis, FIAO; and Denise Trudell, IAO.

There will be six awards, derived from the IAO By-laws, to be presented at this year's annual awards banquet.

I was able to meet with the NYSAA Awards Committee during Cornell in July. We compared notes, resolving any conflicts. A last-minute request for an award came to both committees, in addition to the poor timing, it was decided that it was way too broad of a request for us to consider and was non-specific to any current award recognized.

**Membership Committee**  
**Denise Trudell, IAO, Chair**

The 2018-2019 Membership Committee members are Christine DeFuoco, IAO; Thomas Donato, IAO; Rochelle A. Harris, IAO; Joanne Majewski, IAO; Lawrence G. Quinn, IAO; and Denise M. Spaulding, IAO.

I will have a booth at the conference. I am making up a poster to read "Each One Reach One." I will have a jar of candy with a guess for the number of pieces to entice people to come to the table.

**Nominating Committee**  
**Thomas Frey, FIAO, Chair**

The 2018-2019 Nominating Committee members are Andrea Nilon, FIAO; Teri L. Ross, IAO; Anne M. Sapienza, IAO; and Michael B. Sommer, IAO.

The Nominating Committee approved both members that requested to be placed on the IAO Trustee's Ballot for election: Denise J. Trudell, IAO, Towns of Salina, Lewis, Montague, Osceola, and Boylston; and Brian S. Phelps, IAO, City of Watertown.

**Publication Committee**  
**Andrea Nilon, FIAO, Chair**

The 2018-2019 Publication Committee members are Nathan Gabbert, IAO; Anne Sapienza, IAO; Timothy Sheares, IAO; and Scott Shedler, IAO.

As my 20<sup>th</sup> year as editor approaches, and as technology advances, perhaps it is time to have a discussion about the future of this publication. Although writing as someone from another generation who still reads the newspaper in paper format, delivery of this publication in booklet form may be an outmoded way of distribution, particularly since everything else the NYSAA and IAO provide are in digital format.

Historically it has been difficult to prod our members to pen articles. So as always, your editor is urging the Trustees to consider adapting a course they have written, appraisal they have done, office procedure they employ, or some professional experience they have had that may be helpful to others into an article for the Journal.

### Recertification Committee Deborah Eurich, IAO, Chair

The 2018-2019 Recertification Committee members are Michael Sommer, IAO and Craig Surprise, IAO.

The Committee currently reports 176 members in our database, which includes 70 exempt members. Current records indicate 17 members are required to recertify in 2019.

Members lacking credits for 2019 received notice of their credit deficiency first in May, and a final notification in August. Members were given until September 30, 2019 to request an extension, or to provide proof of credits completed in the appropriate time period no later than October 31, 2019, or be removed from membership.

The committee has prepared recertification packets for the new members receiving their designations at this 2019 Fall Conference. The committee congratulates and welcomes these new members to the Institute.

### Training Advisory Committee Cathy L. Conklin, FIAO, Chair

The 2018-2019 Training Advisory Committee members are Roger Tibbetts, FIAO; Denise Trudell, IAO; and John Zukowski, IAO.

A Training Advisory Group meeting was held on Tuesday, September 17, 2019. Prior to the meeting, ORPTS had sent all members a training needs report dated August 23 and an analysis of the survey results from online offerings of Assessment Administration (April 2019) and Mass Appraisal (June/July 2019). Roger also distributed a report of IAO course offerings.

Cathy noticed on the needs report sent to the group that there were several appointed assessors who were far beyond the required by date for completing a component of training. She questioned whether ORPTS was undertaking any enforcement on appointed assessors. Dave acknowledged the problem and advised the group that once a year he reviews the list and sends a non-compliance letter to both the assessor and their supervisor. At the end of the year, Dave sends a list of those assessors not in compliance to Legal, where no enforcement action has been pursued. We have “required” education but no enforcement since ORPTS merged into T& F.

Dave & Sean pointed out there is a distinction in procedure regarding qualifications for appointment vs. basic education. If a candidate for appointment does not meet the qualifications, ORPTS will so advise the municipality. If the municipality appoints that individual anyway, ORPTS will not list and does not recognize the appointee as the assessor but as local staff only.

### NYSAA Treasurer’s Report Laverne Tennenberg, IAO

NEW YORK STATE ASSESSORS ASSN. 2020 PROPOSED BUDGET

	2017 BUDGET	2017 ACTUAL	2018 BUDGET	2018 ACTUAL	2019 BUDGET	as of 8/31/2019	2020 BUDGET	Change
<b>INCOME ACCOUNTS</b>								
Cornell	\$65,000	\$77,480	\$75,000	\$78,291	\$75,000	\$83,282	\$85,000	\$10,000
One-Day Seminars	65,000	\$56,702	65,000	\$65,421	66,000	\$41,823	65,000	(\$1,000)
Educational Programs*	5,000	\$24,610	10,000	\$0	7,500	\$19,492	10,000	\$2,500
Exams	500	\$1,525	1,000	\$700	500	\$675	500	\$0
IAO Dues	11,000	\$12,002	11,000	\$10,908	11,000	\$11,010	11,000	\$0
Annual Meeting	50,000	\$47,330	50,000	\$41,293	50,000	\$28,255	50,000	\$0
Interest Income	500	\$307	1,500	\$1,300	1,500	\$1,149	1,500	\$0
Miscellaneous	500	\$121	500	\$1	500	\$1	500	\$0
NYSAA Dues	70,000	\$71,670	80,000	\$82,875	81,500	\$80,731	80,000	(\$1,500)
Transfers In	0	\$3,524	25,000	\$25,000	25,000	\$312	4,500	(\$20,500)
<b>TOTAL INCOME</b>	<b>\$267,500</b>	<b>\$291,747.54</b>	<b>\$319,000</b>	<b>\$305,788</b>	<b>\$318,500</b>	<b>\$266,730</b>	<b>\$308,000</b>	<b>(\$10,500)</b>
<b>EXPENSE ACCOUNTS</b>								
Cornell	\$27,500	\$31,352	\$30,000	\$40,551	\$30,000	\$36,079	\$30,000	\$0
One-Day Seminar	30,000	\$35,761	30,000	\$39,798	30,000	\$14,950	30,000	\$0
Educational Programs*	4,000	\$10,997	7,500	\$1,245	5,000	\$11,882	4,500	(\$500)
IAO	8,000	\$6,494	8,000	\$11,458	8,000	\$7,137	8,000	\$0
Journal	5,000	\$4,393	5,000	\$4,154	5,000	\$3,214	5,000	\$0
Accountant	2,500	\$3,530	3,000	\$2,975	3,000	\$1,350	3,000	\$0
Annual Meeting	17,500	\$11,123	17,500	\$28,419	15,000	\$3,200	15,000	\$0
Bulletin	2,000	\$2,122	2,000	(\$773)	2,000	\$666	0	(\$2,000)
Committees	3,000	\$1,880	3,000	\$3,400	3,000	\$2,314	2,000	(\$1,000)
Equipment/Lease	3,700	\$3,306	3,700	\$3,306	5,500	\$2,204	5,500	\$0
Executive Board	13,800	\$13,755	13,800	\$10,454	12,000	\$8,891	12,000	\$0
Fringe Benefits	2,000	\$1,700	2,000	\$2,125	2,000	\$2,333	4,000	\$2,000
General/Misc Expenses	5,000	\$4,634	5,000	\$5,982	5,000	\$12,257	5,000	\$0
Insurance	2,000	\$1,283	2,000	\$2,424	2,000	\$1,381	2,000	\$0
Office Rent/Expenses***	500	\$12,500	35,000	\$30,000	35,000	\$6,736	18,000	(\$17,000)
Office Supplies	4,500	\$14,152	5,000	\$7,200	5,000	\$6,576	5,000	\$0
Payroll/Payroll Taxes	122,000	\$121,856	131,000	\$130,713	134,000	\$92,655	144,000	\$10,000
Postage	3,500	\$3,460	3,500	\$2,700	3,500	\$1,152	3,000	(\$500)
Related Organizations	6,000	\$7,268	7,000	\$6,397	5,500	\$2,579	5,500	\$0
Technology	2,000	\$3,776	2,000	\$6,166	5,000	\$3,307	3,500	(\$1,500)
Telephone	3,000	\$3,169	3,000	\$3,357	3,000	\$1,695	3,000	\$0
<b>TOTAL EXPENSES</b>	<b>\$267,500</b>	<b>\$298,510</b>	<b>\$319,000</b>	<b>\$342,050</b>	<b>\$318,500</b>	<b>\$222,559</b>	<b>\$308,000</b>	<b>(\$10,500)</b>

\*formerly DOS Courses  
\*\* formerly Legisl Trking  
\*\*\*formerly Prof Services

NET INCOME:	NET INCOME:	NET INCOME:
(\$6,762.44)	(\$61,262.29)	\$43,859.06

## **New York State Assessors Assn. Account Balances Report**

As of August 31, 2019

<b>M&amp;T Checking Account</b>	<b>17,333.07</b>
<b>M&amp;T Legal Fund Account</b>	<b>14,893.16</b>
<b>M&amp;T Res. for Equip Account</b>	<b>5,482.28</b>
<b>M&amp;T Savings Account</b>	<b>59,828.31</b>
<b>BofA Checking Account</b>	<b>1,635.28</b>
<b>BofA Savings Account</b>	<b>63,096.90</b>
<b>Bethpage FCU CD</b>	<b>77,422.51</b>
<b>Bethpage FCU Savings Acct</b>	<b><u>5.00</u></b>
<b>TOTAL</b>	<b>\$ 239,696.51</b>

**Net Income YTD:     \$43,859.06**

Prepared by  
Laverne Tennenberg, IAO  
Treasurer

9/12/2019 5:23 PM

# 2019 NYSAA & IAO AWARDS

Congratulations to the 2019 NYSAA and IAO award winners:

Certificate of Appreciation - Curtis J. Schoeberl

Media Award - David McKay Wilson

Distinguished Assistance Award - Candy Akin, CCD

John C. Gamage Award - Lawrence G. Quinn, IAO

Assessor's Outstanding Contribution Award - James F. Maloney, IAO

Lawrence D. Benton Memorial Award for Distinguished Service - J. Todd Wiley, IAO

Susan U. Howarth Outstanding Staff Assistance - Leah M. Cronin

George J. Hill Award - Cathy L. Conklin, FIAO

Robert Osias Professionalism Award - Kandace S. Wittmeyer, SCAA

President's Award - Laverne D. Tennenberg, IAO

IAO Chairman's Award - Edye B. McCarthy, IAO

IAO Chairman's Award - Anne M. Sapienza, IAO

Congratulations to the new members of the Institute of Assessing Officers! Below, from left, past IAO Board of Trustees Chair Roger Tibbetts, FIAO presented Jenna Pettas, IAO, City of Long Beach, and Michael Fouassier, IAO, New York City, with their IAO certificates during the IAO Annual Luncheon at the Annual Conference in Lake Placid on September 24, 2019. At right: Tracy Farrell, IAO, City of Lockport.



# NYSAA LONGEVITY LIST

## New York State Assessors Association

### 2019 Longevity List

#### **TEN YEARS – 2009**

Susan P. Ackermann  
 Calvin N. Cline  
 Joni Dennie  
 Frederick J. Farrell  
 Lorraine Fiorino  
 Lina M. Fusco  
 Penny S. Haddad  
 Stacey Hargraves  
 Amy K. Hewitt  
 Shana Jo Hilton  
 Celeste A. Karakas  
 Deborah Ker  
 Richard D. Lopitz  
 Christopher D. Lyon, IAO  
 Paul Mazzotte  
 Paul O'Leary  
 Patricia A. Osier  
 Darleen M. Sullivan  
 Karen A. Tavernese  
 Dawn M. VanPatten  
 John T. Venezia, IAO  
 Thomas J. Waitkins, IAO  
 Heather Y. Young- Deyell

#### **FIFTEEN YEARS – 2004**

Joan M. Ball  
 Renee E. DeLeeuw  
 Karen Futia, IAO  
 Donna Gooch  
 Robert R. Harris  
 Victoria L. Hayner, IAO  
 Todd M. Huttunen  
 David C. Oliver  
 Renee Ozomek, IAO  
 Philip M. Platz, IAO  
 Anthony Rice  
 Stewart Seguin  
 Stephen E. Teele, IAO

#### **TWENTY YEARS – 1999**

Rebecca K. Baker  
 William H Bearup  
 Glenn Borin, Esq.  
 Gloria C. Cusano  
 Joseph V. DeCarlo  
 Donna DiPippo  
 Glenn A. Droese  
 Carmine F. Durso  
 Alfonso G. Fiorille, IAO  
 Elaine C. Herman  
 Frank E. Krakowski  
 Paul E. Leszczynski  
 Cynthia M. Loncosky  
 David F. Moog, IAO  
 John E. Shoemaker  
 Paul E. Smith  
 Carol S Sweeney, MAI, SRA  
 John H. Wolham, IAO  
 Lyn C. Yuenger

#### **TWENTY-FIVE YEARS – 1994**

Patrick Duffy, IAO  
 Gene A. Froehlich  
 David J. Galarneau, IAO  
 Erin C. Gratch  
 Peter D. Johnson, IAO, J.D.  
 Tracy R. Killeen, IAO  
 Donna M. Komor, IAO  
 John P. McGrory, IAO  
 Michael Sabansky  
 Thomas R. Schum  
 Patrick L. Seely, Jr., Esq.

#### **THIRTY YEARS – 1989**

Kenneth A. Baim  
 Marsha J. Barton  
 Robert J. Breglio, Jr.  
 Joan W. Brundage, IAO  
 Lucille V. Fox  
 Amy Houlihan, IAO

Brian J. Kenney, IAO  
 Lorry J. King  
 Constance L. Luckner, IAO  
 June P. Maniacek  
 Flora L. McCuen  
 Timothy A. Sheares, IAO  
 Walter D. Smead, IAO  
 Lowell W. Stringer  
 Bernard J. Szarek

#### **THIRTY-FIVE YEARS – 1984**

William K. Block  
 David W. Briggs, FIAO  
 Darren W. Colton, IAO, CCD  
 Deborah J. Conti  
 Ronald F. Devine, Jr.  
 Patricia A. Frey  
 Allen M. Jackson  
 David B. Jackson, IAO, AAS, CCD  
 Andrew D. Mohr, IAO, CAE, IFAS  
 J. Craig Surprise, IAO

#### **FORTY YEARS – 1979**

A. Terrance Campbell  
 Thomas Frey, FIAO  
 Richard H. Hubner, FIAO  
 G. Patrick Lester, IAO, MAI, SRA  
 Andrea Nilon, FIAO  
 Jane B. Powers, IAO  
 Stephen H. Robson, IAO  
 Roger E. Tibbetts, FIAO

#### **FORTY-FIVE YEARS – 1974**

Ronald R. Fiorentino

#### **FIFTY YEARS – 1969**

James H. Howarth, FIAO

#### **SIXTY YEARS – 1969**

Wallace J. Wagner

## Membership Recruitment

If you know of a local assessment professional who is not a member of the New York State Assessors Association, PLEASE forward their name and their municipality(ies) to:

NYSAA Membership Committee  
 Christine Hayes, Chair  
 6604 State Route 8, PO Box 90  
 Brant Lake, NY 12815  
 assessor@horiconny.gov  
 518-494-4198

# IAO LONGEVITY LIST

## Institute of Assessing Officers

### 2019 Longevity Awards

#### *TEN YEARS – 2009*

Alan F. Cagney, IAO  
Vito A. Eaffaldano, IAO

#### *FIFTEEN YEARS – 2004*

Colleen A. Adamec, IAO  
Laurie Bell, IAO  
Dennis Ketcham, IAO  
Ann Marie LoFaso, IAO  
David J. Roach, IAO  
Denise J. Trudell, IAO  
Hilda Vera, IAO  
Warren J. Wheeler, IAO

#### *TWENTY YEARS – 1999*

Nanette Albanese, IAO, SRA  
Donald Collins, IAO  
Mary C. Jackson, IAO  
Ann Marie Keeley, IAO  
Jeanne W. Nielsen, IAO  
John H. Wolham, IAO

#### *TWENTY-FIVE YEARS – 1994*

Christopher G. Boryk, IAO  
Paul E. Jonke, IAO  
John P. McGrory, IAO  
Noreen P. Whitty, IAO

#### *THIRTY YEARS – 1989*

Cathy L. Conklin, FIAO  
William F. Harazim, IAO  
Wayne B. Pickering, IAO

#### *THIRTY-FIVE YEARS – 1984*

Anthony V. DeBellis, IAO  
Charles G. Firmbach, IAO  
Thomas Frey, FIAO  
Jane B. Powers, IAO  
Signe Rominger, IAO

#### *FORTY-FIVE YEARS – 1974*

James H. Howarth, FIAO

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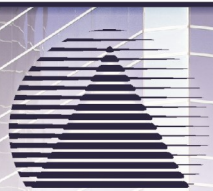


# MEMBER MILESTONES

Member Milestones will publish important events pertaining to current and past NYSAA and IAO members. Milestones include new members, position changes, retirements, deaths, etc. Your help is needed to ensure that every milestone is noted! Please email your milestones to [admin@nyassessor.org](mailto:admin@nyassessor.org).

In Memoriam: Ronald Garropy, Town of Fleming; Ruby Bruce, Town of Colden; Sandra (Boughton) Smith

Please welcome new members: Roxanne Ducoin, Town of Ellington; Richard Beaini, Harris Govern; Dianna Carchidi, Town of Olive; Sonya Chadwick, Towns of Conewango, Randolph, Salamanca; Ivo Chilian; Orange County; Bernadette Fanuele, Town of Pawling; Ronald Keibel, Town of Triangle; Elizabeth Lerow, Cattaraugus County; Jennifer Lyman, Town of Vienna; Jennifer Moore, Town of Fallsburg; Kaitlyn Quesinberry, FairTax America; Barbara Roberts, City of Corning; Leon Shorette, Town of Brasher; Ana Sklark, Houston, TX; William Sulzer, Griffin, Coogan, Sulzer & Horgan P.C.; Donna Szurek, Town of Amsterdam



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## What's New in the NYSAA Office?

In last month's issue of the Bulletin, we included a little tease about changes going on at the NYSAA office in Liverpool, NY. Since then, we held our first class in our new classroom! That's right, in addition to new headquarters, the office space includes a classroom that can seat 18 students. An interactive monitor, courtesy of the Fund, will be installed in October, further enhancing NYSAA's ability to deliver quality instruction. Here are a few photos from our first class held in August, Fundamentals of Mass Appraisal, and taught by Aaron Lesch-Von Randall from NYS ORPTS and Anne Sapienza, IAO, now the chair of the IAO Board of Trustees.



**New York State Assessors Association, Inc.**  
116 Salina St., Suite 8, Liverpool, NY 13088

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*Did you enjoy this year's conference in Lake Placid? Missed it and wished you could have attended? NYSAA will be there again in 2020. Save the Dates: October 4-7, 2020*



**2019-2020 INSTITUTE OF ASSESSING OFFICERS BOARD OF TRUSTEES**

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Affiliated with the International Association of Assessing Officers (IAAO) and the Institute of Assessing Officers (IAO), which is chartered by the Board of Regents of the University of the State of New York. The New York State Assessors Association Bulletin is published bimonthly. The I.A.O. Journal is published twice a year—usually in January and July. Any news or articles are welcome and should be mailed to:

**\*\*BULLETIN\*\***

Warren J. Wheeler, IAO, Executive Director  
116 Salina St., Suite 8, Liverpool, NY 13088

**\*\*JOURNAL\*\***

Andrea Nilon, FIAO, Editor, IAO Journal  
PO Box 672, Pine Bush, NY 12566

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