



# NEW YORK STATE ASSESSORS ASSOCIATION **BULLETIN**

**VOL. LXXXIII**

**SEPTEMBER-OCTOBER 2023**

**No. 5**



Maggie Alix,  
NYSAA President 2023/2024

## Maggie Alix Installed as NYSAA's President

On Thursday, October 5, 2023, Maggie Alix was installed as NYSAA's president for 2023/2024. Below is her acceptance speech:

Good evening,

First let me take this opportunity to congratulate 1<sup>st</sup> Vice President Rob Bick, 2<sup>nd</sup> Vice President David Roach, and Board Members Lisa Goree and Jill Murphy. Board Member Joshua Herman will be sworn in, in the near future. I look forward to working with you and the entire Executive Board in the coming year.

I am honored to be the 83rd President of the New York State Assessors Association. I am humbled by this opportunity, and by the amount of support I have here tonight.

This time last year while in Lake George, Past President Lloyd Tasch said to me, it's a good thing we're having your installation at a city center, knowing all too well that my family would be here in full support. My mother Jill; my sister Abby; brothers Michael and Dan; my sisters-in-law Tanya, Amy, and Christina; and my Uncle Jerry have joined me this evening. In addition, I have my dear friends the Karwiels and my friends and colleagues from the Town and Village of Green Island. I truly appreciate all of you being here this evening. The people around these four tables are the members of my team; they work side by side with me day in and day out and allow me the ability to give my time to the Association.

Not only is this an honorable night for myself but also for Green Island. The Association represents municipalities from Long Island, out to Buffalo, and as far north as Franklin County, but before this evening I'd have to assume that the majority of you have never heard of Green Island. Green Island is one of only five conterminous town – villages in the state. It's located in Albany County, just eight miles north from the City of Albany. Green Island is unique, its rich in history and culture all packed into one square mile. Although mostly residential, the small commercial businesses are what give Green Island it's character, and we are grateful for the industrial investments that have fostered our economic growth.

So, although I stand before you from a municipality with less than 900 parcels, have no fear, I have all of you. This room is filled with intelligent and skilled assessors. No two assessors have had the same experience; there's always a niche or twist to be discovered. There's a curiosity to assessing that leads to the desire to learn.

I challenge all of you to avoid complacency. If you are working toward basic certification let the Association help guide you. Challenge yourself past the required 12 hours of continuing education; work toward an advanced certification, your IAO, or explore IAAO courses. Choose the path that works best for you, but push the boundaries of what you can achieve as an individual. As a result, you'll gain confidence and resiliency. I'm confident that the Trustees will continue to advance our profession by providing the membership with a variety of educational offerings, and with great thanks to the continuous support of the Fund the Association's future is bright.

*Alix continued on page 18*

**EDUCATIONAL CALENDAR**

All classes listed below are offered online. Please visit [www.nyassessor.org](http://www.nyassessor.org) to register.

IAO One-Day Seminar:  
Ethics and the Assessor  
December 8, 2023  
Instructor: Anne Sapienza, FIAO

Basic Certification:  
Course 2: Application of the Three Approaches to  
Value  
November 29, December 1, 4, 6, 7, 2023  
Instructor: Warren J. Wheeler, IAO

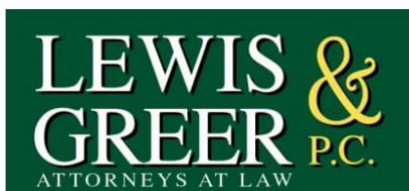
**Meeting Calendar**

NYSAA Executive Board  
January 11-12, 2024, Green Island  
April 4-5, 2024, Green Island (tentative)  
Cornell: July 13, 2024  
Fall Conference: September 22, 2024

IAO Board of Trustees  
January 10-11, 2024, Green Island  
April 3-4, 2024, Green Island (tentative)

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# Outgoing President's Report

A presidents reflection on the past year. From taking office on September 2022, the duties and responsibilities of the presidency began quite quickly, and it has not slowed down.

## Highlights:

October – Organizational Meeting, attended Association of County Directors

November – Webinar, Zoom meetings

December – Association Meetings, RPTAC, Association Christmas Party

January – Attend Association Meetings, swearing in of new officers, ORPTS Assessment Admin Class, 1<sup>st</sup> Executive Board meeting of the year

February – Association of Towns, County Assessors Association meetings, RPTAC, Webinar

March – Committee Meetings, County Association meetings, Zoom meetings, Webinar

April – Second Executive Board meeting, Condo Legislation meetings – Warren County

May – Webinar, Zooms

June – County Association meetings, RPTAC, Webinar

July – Cornell Seminar on Professional Development, Zoom meetings

August – Zoom meetings

September – NYCOM conference in Lake Placid



Christine Hayes SCA,  
NYSAA Past President

At our first Executive Board meeting in Lake George, we, the Executive Board, invited the Trustees to attend a combined meeting. The intent is to come together: TEAM NYSAA. My tenure was based on this premise. However, even I strayed from this a little, I guess I am only human after all.

Our main focus this year has been legislation and webinars. Our legislative and webinar teams have gone above and beyond, we have provided our members with the information they said they wanted, and legislation is always a moving target. We will continue to stay on top of the issues as much as it is humanly possible.

On the premise of working together, we have discussed the combining of committees, removing duplication, and improving communication between the boards. This will be discussed in the near future.

There are talks of purchasing a program that will take our organization into the 21st century. This will simplify our membership lists and how dues notices are prepared. There is a financial, conference portion, a membership only section, along with several other capabilities.

Our Constitution and Bylaws Committee worked a great deal on making needed changes. Thank you – this was a big task this year.

Our membership is at the highest level it has ever been. I believe the class offerings, utilizing both hybrid and in-person classes, provide our members with their wants and needs. Staying up to speed with technology has been our redeeming feature. We thank The Fund Trustees for being there, providing funds to keep our technology current.

AND we all learned the meaning of ex-officio. My hope is that the organization never stops learning and evolving.

One year just never seems to be enough time to accomplish everything that needs to be done. Maggie has got this covered and will do a much better job than I was prepared to take on. Thank you EVERYONE for your support, thank you for this opportunity to serve. I hope that I can continue to give back to this organization in any way possible.

# Executive Director's Report

As Trustees Chair Rochelle Harris, IAO notes in her report in this issue, time flies! When I look back on the activities it takes to keep our Association running, I wanted to share a peek behind the curtain with you. As you can see, we rely on our members' time and dedication to assist with providing the best services possible to all of you. Our volunteers do amazing work! If you've ever thought about how you can become more involved with NYSAA, stop thinking and join us! Your time and skills are needed and welcome!

Here's a snapshot of activities—maybe there's a committee for you!

July 25—Trustees meeting regarding by-laws  
 August 1—NYSAA voting closes and results certified  
 August 2—Joint awards committee meeting  
 August 4—2024 Cornell Professional Development meeting  
 August 16—Fund meeting  
 August 17—Exam Committee meeting  
 August 22—Education Committee meeting  
 August 25—Instructor meeting  
 August 25—New Executive board member orientation  
 September 6—Saratoga preparation meeting with hotel staff  
 September 18-20—Attended NYCOM in Lake Placid



Warren J. Wheeler, IAO  
 NYSAA Executive Director

## Cornell 2023

Our summer conference on professional development was a huge success. We managed to hit our budgeted profit target. There will be future discussions on how many and what classes to hold on campus versus the host hotel. The dates for the Cornell conference next year are July 14-19, 2024, again at the Hotel Ithaca.

## One-Day Seminars

We continue to experience success with our one-day seminar offerings. At the time this report was written, we had held 16 classes and achieved an average of 28 students per class.

## Fall Conference

Saratoga Springs proved to be a popular destination and a draw for conference attendees. We had a total of 244 attendees: 207 in person and 37 virtual. This is a record attendance as far as I can remember. The number of vendors is increasing, up to 12 from 8 last year and 5 in 2021. New to the vendor floor were representatives from the IAAO and the state retirement system. We had some overflow in some of the classroom space due to the increase in attendance, and we hope to continue that trend as we look for venues that can accommodate our growing needs! Be sure to save the date for next year's conference!

*Save the Dates—NYSAA Fall Conference*

*September 23-26, 2024*

*Woodcliff Hotel and Spa*

*Fairport, NY*

*In the beautiful Finger Lakes region*





# ANNUAL MEETING AND SEMINAR ON ASSESSMENT ADMINISTRATION

Editor's Note: The Annual Meeting and Seminar on Assessment Administration was held at the Saratoga Hilton in Saratoga Springs, NY, October 3-6. The Annual Meeting for Members was held Wednesday, October 4, and the yearly committee reports are below. Some of these reports have been edited for space. Full reports are available by contacting Tracy Carman at [admin@nyassessor.org](mailto:admin@nyassessor.org).

## **2023 NYSAA Annual Meeting Committee Reports**

### **NYSAA President's Report Christine Hayes, SCA**

See page 3 for outgoing President Christine Hayes' report.

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

See page 4 for Executive Director Warren J. Wheeler, IAO's report.

## **NYSAA Standing Committees**

### **NYSAA Auditing Committee Deborah Eurich, IAO, Chair**

The 2022-2023 Auditing Committee consists of John Noto, IAO and Marianne Owen-Feely.

The Audit Committee met on June 26, 2023 via Zoom to inspect and audit the fiscal 2022 financial records of the New York State Assessors Association, the John Way/John Costello Memorial Education Fund, and the New York State Chapter of the IAAO.

Treasurer Laverne Tennenberg, IAO supplied all financial documents in advance of the meeting to provide the committee with adequate time for review, and responded to all questions asked by the Committee during and prior to the meeting. President Christine Hayes also joined the meeting, offering insight and answering questions for the Committee.

The Committee discussed the New York State Chapter of the IAAO, noting that it continues to be inactive, with a balance in the treasury, however an IAAO course is scheduled for Cornell 2023.

The NYSAA Capital Asset List was reviewed and found to be current. Recommendations for policies regarding asset purchases, retention, and disposal were provided to the Board.

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.

Thank you to fellow committee members John Noto, IAO and Marianne Owen-Feely for their able assistance. The committee again thanks Treasurer Tennenberg for a commendable job keeping NYSAA's financial records in order. Thank you for the opportunity to serve the NYSAA with this important assignment.

Reports continued from page 5

**NYSAA Constitution & Bylaws Committee**  
**Lisa Goree, Chair**

The 2022/2023 Constitution & Bylaws Committee consists of Thomas Donato, IAO; Tracy Farrell, IAO; Rochelle Harris, IAO; William Purtell, IAO; and David Roach, IAO.

Below is a summary of the NYSAA Constitution and Bylaws amendments approved at the Annual Meeting on October 4, 2023.

**Article 1 – Section 1:** Add: The NYSAA shall be managed by the Executive Board as outlined in Article IV.

**Article 1 – Section 2:** Change objectives to mission.

**Making the by-laws to conform to gender neutrality:** Changing all occurrences of him/her and himself/herself to themselves or the member throughout the entire document.

**Article 3 – Section 2:** Add: The term of the President shall be (1) one year.

**Article 4 – Section 9:** Add section 9 as follows: A sitting Executive Board Member cannot simultaneously hold a seat on the IAO Board of Trustees or The Fund Trustee Board.

**Article 6 – Section 1:** Add line: The President or their designee shall act as the official spokesperson in matter of public policy, liaison to outside local & state agencies and preform all other duties necessary to carry out the duties of the NYSAA.

**Article 10 – Section 1 – Paragraph A:** Add: A notice of the annual meeting shall be sent by the Executive Director to all NYSAA members at least 10 days in advance of the meeting.

**Article 12 – Section 7:** Add section 7 as follows: E-mail communications:

All e-mail communications to the general membership will be sent to the Executive Director and President for review. Any NYSAA member (Regular, Associate, Life, Honorary, Affiliate, or Retired) must seek approval from the Executive Board to communicate with the general membership via the e-mail distribution list. If approved, said email shall be distributed by the Executive Director. Use of the general membership e-mail for campaigning purposes is prohibited.

**Article 13 – Section 1: Code of Ethics – Paragraph 3:** Add line: Use caution to avoid the appearance of impropriety, even if no such act exists or is intended.

**Article 13 – Section 2 – Paragraph 1:** Add Line: the member shall be dedicated to excellence in assessment administration and equal distribution of real property tax.

**Article 13 – Section 2 – Paragraph 4:** Add Line: To strive for the individual & collective recognition of the assessing field as a profession and continually seek to take advantage of educational resources and networking opportunities with assessing professionals in the state.

**Rules and Regulations – Section 2:** Add Line: The Constitution & By-laws of the New York State Assessor's Association will supersede any local chapter's Constitution and By-laws, if there are any conflicts or omissions.

**NYSAA Ethics Committee**  
**Thomas Donato, IAO, Chair**

The 2022/2023 Ethics Committee consists of Lisa Goree; Josh Herman, IAO; James LeGrett; David Roach, IAO; Daniel Ross, IAO; and Teri Ross, IAO.

It is with great pleasure to report that the Ethics Committee has had no viable complaints or concerns requiring review or action during the 2023 year.

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### **NYSAA Legislative Committee Maggie Alix, Chair**

The 2022/2023 Legislative Committee consists of Rochelle Harris, IAO; Josh Herman, IAO; Andrea Nilon, FIAO; John Noto, IAO; Daniel Ross, IAO; Curt Schoeberl; Scott Shedler, IAO; Shanelle Washington; Heather Weinhold; and Todd Wiley, IAO.

Here is a recap the committee's work over the past year:

Ended the 2022 calendar year with the Governor vetoing the Condo Bill A03491B/S05946B, and signing bill A01980/S01980; requiring a second notice of tax exemptions for senior citizens.

In January, Sen. Michelle Hinchey, District 41, introduced "The Short-Term Rental Registry Act"; which generated a lot of questions and sparked the committee's interest. The committee was interested in including language to allow an assessor the ability to modify assessments based on change of use. The committee went on to prepare a panel to present "Short-Term Rentals and Assessing as Commercial Property" at the AOT conference in February.

The Executive Budget had two components that were of interest to the assessment community:

Part K: simplifying and modernizing the definition of income for the senior citizens exemption

- The Association put forth a tremendous grassroots effort to oppose the provision. Although the provision was not eliminated from the budget, the committee was able to get changes made before the final adoption.
- The Association hosted a webinar to explain the new income calculation, and worked collaboratively with DTF to do a question and answer email.
- The Association continues to work on implementing changes to the application forms/worksheet.

Part N; clarifying that adoption of the solar and wind energy system appraisal model is not subject to the State Administrative Procedure Act (SAPA)

- This provision codified the state's solar and wind valuation model into law.

Additional tasks:

- Submitted written testimony for the Joint Public Hearing on Taxes
- Met with the new Chair of Real Property Tax, Jamie Williams, on a couple of different occasions: to review the Association's Legislative Agenda and to explain the need for the Staggered Exchange Bill.
- Met with Assembly Member Zebrowski and staff regarding the Staggered Exchange Bill and the need to clarify the language in the firefighter's legislation. The intent of the law is not clearly stated in the language, leaving too much room for interpretation.
- Discussed with the sponsor of the second notice bill the need to amend the language to narrow the pool of recipients receiving notice, methods of notification, and the timing of the notice.

### **NYSAA Membership Committee Joanne Majewski, IAO, Chair**

The 2022/2023 Membership Committee consists of Rae-Lynn Dussault; Lisa Goree; Joshua Herman, IAO; Jill Lederhouse; Kelly Miller; and Heather Weinhold.

The New York State Assessors Association gained 87 new members in 2023. There were 68 non-renewals mostly due to retirement and consolidation of assessment boards. We have a net gain of 19 new members with a total of 937 members.

Last year 23 counties reached 100% membership. This year there are 25 counties with 100% membership.

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**NYSAA Memorial Committee  
Heather Weinhold, SCA, Chair**

It is with deepest regrets that I inform you and the membership of the list of our fellow assessors that we lost:	
Francis Militano, Retired Assessor, Town of Kent	June 4, 2018
Henry Van Middelem, IAO Assessor from Nassau County	December 11, 2022
William Conway, Retired Assessor, Town of Cheektowaga	January 7, 2023
Cheryl Timmons, Assessment Clerk, Town of Ossining	February 21, 2023
Anthony R Galletto, Retired County Director, Monroe County	March 20, 2023
Linda Y. Yancey, Retired Assessor, Ontario County	May 11, 2023
Michael R. Spiegel, Retired Assessor, Monroe County	August 10, 2023
Patricia Caligiuri, Retired Assessor, Town of Aurora	September 26, 2023

**Select Committee Reports**

**Real Property Tax Administration Committee (RPTAC)  
Teri Ross, IAO, Chair**

The 2022/2023 RPTAC committee consists of Maggie Alix; Thomas Donato, IAO; Rochelle Harris, IAO; Jeneen Hill, SCA; Curt Schoeberl; Scott Shedler, IAO; and Warren J. Wheeler, IAO

**Legislative Update:**

**Budget items:**

The use of the ORPTS solar calculator is now mandatory for solar projects. Many assessors are having difficulty getting the info needed for calculator input. Tobias Lake from ORPTS legal will check with NYSERDA to determine if the info is available from other sources.

**ORPTS Farm Course:**

Rochelle Harris, IAO will be meeting with the ORPTS staff that updated the Farm Course to determine if assessor input is needed.

**RPS Online:**

Some potential screens were shared with RPTAC and the Governance Committee. The tentative release date for Phase 1 is sometime in 2025.

**RPSv4:**

Assessors requested more reasons be made available for closing IVPs—ORPTS staff is working on them.

**Volunteer Firefighters Exemption:** discussion about V4's ability to process the exemption correctly—per ORPTS functionality should be completed by fall.

Karen Quinn from ORPTS is now the lead for RPSv4.

**STAR Reports:**

Karen Quinn and Teri Ross, IAO will be working on various STAR reports to hopefully make them more user friendly.

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## **John H. Way - John M. Costello Memorial Educational Fund Report NYSAA Annual Membership Meeting**

The 2022/2023 Fund Trustees are James J. Molinaro, Jr., IAO, Chair; Colleen Adamec, IAO; Robert Criddle, IAO; Patrick Duffy, IAO; and Denise Spaulding, IAO.

The Fund Trustees worked over the past year with the Association and IAO Board of Trustees to support and advance The Fund's educational mission through the following activities:

- Approved requests for financial assistance totaling \$1,745.90 to support and enhance the delivery of hybrid learning. This included various equipment, two (2) Epson projectors, portable microphone, and three (3) portable screens.
- Awarded fourteen (14) scholarships for attendees at the 2023 Cornell Seminar on Appraising, two (2) of which were new for individuals who challenged the IAO course and test and four (4) scholarships for this Annual Conference.

While enjoying this year's Annual Conference in beautiful Saratoga Springs, please be sure to support The Fund's mission by visiting the vendor booths and Raffle Table. And don't forget to buy your tickets for the 50/50 Raffle!

The Fund continues to be very strong financially experiencing a relatively moderate increase overall of 7.82%. This is due largely to the professional guidance provided by our advisors at Merrill Lynch and the sound stewardship of the Trustees. Merrill Lynch account balances as of August 31, 2023 were:

Investments	\$336,521.79
Cash Management Account	\$ 4,980.39
Total	\$341,502.18 (13.01% increase from December 31, 2022)

In closing, I extend my sincere thanks to my fellow Fund Trustees for their dedication and hard work throughout the year, including Robert Criddle, IAO; Colleen Adamec, IAO; Patrick J. Duffy, IAO; and Denise M. Spaulding, IAO.

### **IAO Board of Trustees Chair Rochelle Harris, IAO**

Time flies when you are having fun they say, although some may perceive this as fun, it is a lot of hard work and time. This year has had its share of ups and downs, and we certainly have accomplished a lot. I would like to recognize and thank the NYSAA Executive Board for all their support throughout the year. Since taking over as Chair of the Trustees in April, I have had too many meetings to even count. I had no idea how much time and energy this takes, so shout out to all previous Trustee Chairs for all your work in the past, I hope I have made you and our members proud.

I wanted to jump in feet first and get right to work, A big change I have initiated is monthly status meetings with the Trustees: my hope is that when we have our regular meetings it will go much more smoothly, and our initiatives will be completed.

Another thing I asked coming in as Chair was the need for checks and balances as well as a person who can step in and take the reins in situations where the Chair is not able to perform their duties, so I asked to create the Deputy Chair position. I also asked for votes that would look at the majority of the Board instead of just who is in attendance. Looking at these items opened the door for our by-laws committee to take an in-depth dive into the document. As you can see, they found a few items that needed some updating as you all voted on those changes. There is still a lot of work and clarification that is needed, and the by-law committee will be busy again this year.

Because our education is our number one priority, getting our Education Committee re-established was one of my most important goals. In August, after much thought and consideration, I decided to put this committee in

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the very capable hands of Edye McCarthy, IAO as Chair. This committee has been working very hard dissecting and data mining to bring the best classes to you. There will be some very exciting changes and classes coming your way as this committee progresses.

Cornell was very successful this year. The Hotel did an amazing job, as did our instructors, and a few new and challenging courses were offered. We were successful in reestablishing a relationship with Cornell staff, and I would like to thank Dennis Ketcham and his committee for putting together a wonderful array of classes at our summer training. The IAAO class was a HUGE hit, and we hope to continue bringing that high caliber training to you!

Victoria Sirota, IAO has been a very busy Trustee; she and her committee have put together a stellar slate of classes for our conference. She has worked very closely with Brian Phelps, IAO to bring some exciting new technology to our conference.

Going forward my hope is to continue working on new classes, retaining our current instructors, and offering the Instructor Training Workshop class in 2024 and to promote the development of new instructors.

We have made great strides in expanding our course library. Also, for the newcomers, we will be setting up a cycle of required courses throughout the year in addition to our annual summer training. We have a wonderful hi-tech training facility in Liverpool, and now that we are back in person our hope is that we will be utilizing it much more often.

I would also like to take a moment to urge you to get involved! First, if you haven't taken the IAO exam, please do consider taking it. Many members have seen pay increases, new job opportunities and, if neither of those occur, it really is a great accomplishment to add the IAO to your name! We need new members to continue doing what we do.

There is nowhere to go but up, and we can do this together with dedication, hard work, and new ideas to bring us to the next level. I look forward to the challenges and work ahead of us for 2024!

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# 2023 AWARD WINNERS

*The NYSAA and IAO awards were presented on October 4 during the fall conference at the Saratoga Hilton in Saratoga Springs.*



Christine Hayes (left) and Teri Ross, IAO presented the Media Award to Anthony Hall, editor of the Lake George Mirror.



James Snyder, IAO presented Erin Gratch with the Assessor's Outstanding Contribution Award.



Denise Trudell, IAO (left) presented the John F. St. George Award to Patrick Duffy, IAO.



NYSAA President Christine Hayes (right) presented the President's Award to Lori Barber.



Above left, Colleen Adamec, IAO (right) presented Deanne Rehm with a Certificate of Appreciation. Above right, Kim Johnston (left) and Denise Trudell, IAO presented the Distinguished assistance Award to Justin Taylor, BAR Chair for the Town of Clayton.



# 2023 AWARD WINNERS



Far left, Victoria Sirota, IAO presented the Lawrence D. Benton Memorial Award for Distinguished Service to Timothy Sheares, IAO. Near left, Curt Schoeberl presented Roger Tibbetts, FIAO with the Distinguished Service Award.



Far left, Denise Trudell, IAO (left) presented the George J. Hill Educator Emeritus Award to Donna Komor, IAO. Near left, Brian Phelps, IAO presented the Elliot Glaser Lifetime Achievement Award to Edye McCarthy, IAO.



Far left, Deborah Eurich, IAO presented the Robert Osias Professionalism Award to Dennis Ketcham, IAO. Near left, Warren J. Wheeler, IAO presented the Executive Director's Award to Victoria Sirota, IAO.



Far left, Victoria Sirota, IAO presented the IAO Distinguished Assistance Award to James Molinaro, Jr., IAO. Near left, Rochelle Harris, IAO presented the IAO Chair's Award to Edye McCarthy, IAO.

# 100% County Membership

*Congratulations to the following counties for achieving*

*100% County Membership:*

<i>Cortland</i>	<i>Niagara</i>	<i>Tioga</i>
<i>Erie</i>	<i>Ontario</i>	<i>Tompkins</i>
<i>Fulton</i>	<i>Orange</i>	<i>Ulster</i>
<i>Hamilton</i>	<i>Putnam</i>	<i>Warren</i>
<i>Lewis</i>	<i>Rockland</i>	<i>Westchester</i>
<i>Livingston</i>	<i>Saratoga</i>	<i>Wyoming</i>
<i>Madison</i>	<i>Schenectady</i>	<i>Yates</i>
<i>Monroe</i>	<i>Suffolk</i>	
<i>Montgomery</i>	<i>Sullivan</i>	



*Congratulations to  
the counties that  
reached 100%  
NYSAA membership  
in 2023!*

*Please contact the  
NYSAA office at  
[admin@nyassessor.org](mailto:admin@nyassessor.org)  
if your county associa-  
tion didn't get its  
check at the  
conference.*



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Saratoga County

Assessors Association—  
conference bag goodies

Starbuck Island Apartments—  
Installation Dinner favor

Western New York IAAO Chapter—  
conference bags

# New York State Assessors Association

## 2023 Longevity Awards

**TEN YEARS - 2013**

Barry L. Baker  
Laura B. Chadwick  
Kelli M. Coughlin  
Bryan M. Delaney  
Kathleen A. Fitzgerald  
Moses Fridlich  
Katherine N. Gabriel  
Lisa R. Goree  
Audre Higbee  
Brian Knapp  
James A. LeGrett  
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Holley L. Smalt

**FIFTEEN YEARS - 2008**

Daniel P. Baker II  
James H. Bateman  
Lisa M. Bennett  
Richard A. Brann  
Cathy L. Drobny, Esq.  
Erik Finbar  
Lori Frongetta  
Ann E. Gallagher, IAO  
Harold J. Girdlestone  
C. Bruce Green, IAO  
Michael S. Hartman, IAO  
Thomas J. Isenbek, IAO  
Thomas E. Jacques

Katherine A. Johnson, IAO

Mary Beth Johnson  
Gregory F. Klingler  
Jill M. Lederhouse  
Leigh Anne E. Loucks  
Sheryl Luongo  
David C. Marrano, SCA  
Dawn M. Martin  
Thomas Mleczo  
Lezlianne Parsons  
Teri L. Ross, IAO  
Tami Snyder  
Pamela R. Valenza

**TWENTY YEARS - 2003**

Darlene A. Balio-Abbatecola  
Suzette M. Booy, CCD  
Thomas Donato, IAO  
Rae-Lyn Dussault  
Stephan E. Gotovich  
Sherry L. LaVancher  
Gary E. Link, IAO  
Michael J. Miller, IAO  
Mark A. Minoia  
Louisa F. Tang, IAO

**TWENTY-FIVE YEARS - 1998**

Nelson Bills, IAO  
Anthony C. DeStephen  
Charles H. Ferris  
Richard C. Morris  
Anthony R. Popolizio, IAO  
Hilda Vera, IAO

**THIRTY YEARS - 1993**

Rochelle A. Harris, IAO  
Paul E. Jonke, IAO  
Linnea E. Wilson

**THIRTY-FIVE YEARS - 1988**

Ann Buck, IAO  
Barbara J. Galloway, IAO  
Barbara J. Hall, IAO  
Michael A. Marsden  
Theresa R. Murdock, SCAA  
Wayne B. Pickering, IAO

**FORTY YEARS - 1983**

Thomas W. Masten, IAO

**FORTY-FIVE YEARS - 1978**

Anthony V. DeBellis, IAO  
Paula Sarvis McLaughlin, SCAA  
Shirley D. Royak

**FIFTY YEARS - 1973**

David A. Arlen, RES

**FIFTY-FIVE YEARS - 1968**

Joseph J. Tanzella, IAO

# Institute of Assessing Officers

## 2023 Longevity Awards

**TEN YEARS - 2013**

Robert B. Ball, IAO  
Joanne M. Majewski, IAO

**FIFTEEN YEARS - 2008**

Darren W. Colton, IAO, CCD  
Thomas Donato, IAO  
David F. Moog, IAO  
Brian S. Phelps, IAO  
Philip M. Platz, IAO  
Steven E. Teele, IAO  
Daniel T. Whittemore, IAO

**TWENTY YEARS - 2003**

Louisa F. Tang, IAO  
James J. Timmings, IAO

**TWENTY-FIVE YEARS - 1998**

Nelson Bills, IAO  
Nathan T. Gabbert, FIAO

**THIRTY YEARS - 1993**

Ann Buck, IAO  
Brian J. Kenney, IAO  
Edye B. McCarthy, IAO  
Ronald L. Monfils, IAO  
William D. Quick, IAO  
Timothy A. Sheares, IAO

**THIRTY-FIVE YEARS - 1988**

David B. Jackson, IAO, ASS, CCD

**FORTY YEARS - 1983**

Andrea Nilon, FIAO

### *Congratulations to the New IAO Members!*



Four of the five new IAO members were sworn in at the IAO Luncheon on October 5 at the Fall Conference. From left, Leah Cronin, AnneMarie Zarelli, Jennifer Mund, and James Kirsch. Absent: Molly MacElroy

# MEMBER MILESTONES

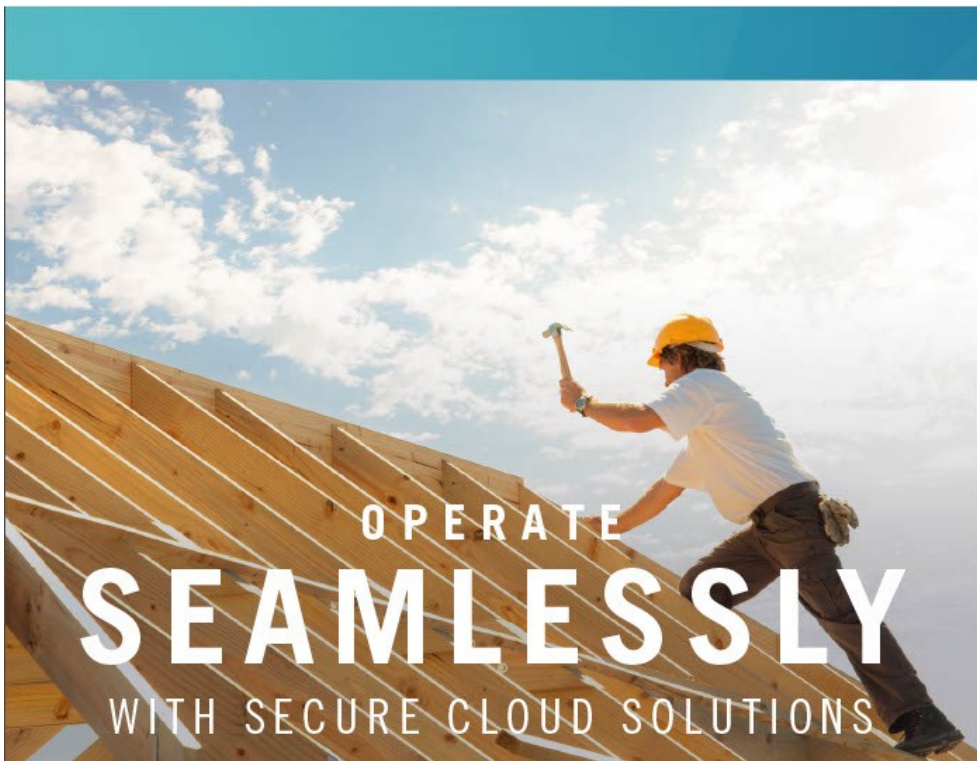
Milestones include new members, position changes, retirements, deaths, etc. Your help is needed to ensure that every milestone is noted! Please email your milestones to [admin@nyassessor.org](mailto:admin@nyassessor.org).

Please welcome new members: Douglas Atkins, Forchelli Deegan Terrana LLP; Lisa Coryea, Town of Westville; Elyssa Farnham, Town of Livonia; William Haggerty, Town of Ramapo; Lisa Hewitt, Towns of Kendall, Carlton; William McCarty, Town of Putnam; Kristin Miller-Gutberlet, Town of Webster; Jason Penighetti, Forchelli Deegan Terrana LLP; Donna Stagnitta, Town of Bethlehem; Alexia Vassiliou, Town of North Salem

Please welcome returning members: Heather Garner, Town of Elbridge; Harry Weissman, Town/Village of Ellicottville

Congratulations to Thomas Frey, FIAO for 40 years of continuous IAAO membership!


In memoriam: John Haines Barrett, retired assessor; Patricia Caligiuri, Assessor, Town of Aurora; Alton W. "Ike" Guyette, retired assessor; Michael Spiegel, FIAO, retired assessor



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Alix continued from page 1

When Rochelle Harris approached me about being on the Executive Board, on the last day of the conference, outside of the pool area at the Crowne Plaza in Lake Placid, nine years ago, I thought to myself, why me? I hoped it wasn't for my antics on the dance floor the night before but because she saw in me a willingness to be a team player, a desire to help others, and the commitment to make a difference.

Not only is Shelly responsible for getting me to apply for the Board, but once elected, and after I had some time to "get my feet wet," she assigned me to chair of the Legislative Committee. She gave Scott Shedler and I the opportunity to tackle real property tax issues head on. At first, I was overwhelmed, but then Sue Otis called one day and gave me advice on how to move forward, which gave me the courage to assume the role. Since then, with the support of the Executive Board, Scott, myself, and the legislative team have stood our ground against the telecommunications industry, have fought back against solar, and have drafted and passed legislation. We were able to get the president of the Association named to the state's tax exemption task force, and I too was named separately by the Speaker of the House. Our team has cultivated relationships with the Association of Towns, the New York Conference of Mayors, and we have gained the respect from members of the state legislature. Although it's been five years already, it feels like we're just getting started. It's a long process, but we are committed to being a voice of the assessment community. Know that whether you express concerns or ideas in conversation or by email, your voices are heard. You are making a difference. We haven't won every battle, but we are in the fight.

I hope during my presidency as an association we can create a balance between appreciating and preserving institutional knowledge with enabling creativity and innovation. Together, the Executive Board, the Trustees, and the Fund, we can create a culture that is relatable to the entire membership. A culture that brings out the best of everyone in a way that boosts productivity. As leaders we need to understand what drives our members to effectively devise strategies that align with the Association's goals and objectives.

Before I close, I want to thank the Albany Schenectady County, Saratoga, and Warren County Assessors Associations, and the Conference Committee for welcoming us to Saratoga. Thank you for making this conference one to remember.

Thank you to those of you who participated in the Build-a-Bear activity on Tuesday. Green Island's adopt-a-family program is near and dear to me. I assure you that the bears will brighten the lives of many children this holiday season.

Thank you to all of our vendors and sponsors. Most everything this week came as a surprise to me, so if I haven't shared my thanks this evening, please know you'll be hearing from me soon.

And lastly, thank you to all those that have come before me. I've had the pleasure of working with the past presidents from Dennis Ketcham to Christine Hayes. I learned something from each one of you. And to all of the prestigious leaders of the Association, leaders who have added layers to the Association's strong foundation, thank you. As we continue to advance the Association, let's communicate respectfully, share new ideas freely, disagree amicably, as we continuously learn together.

Thank you!

### Thank you to Our 2023 Conference Vendors!

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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

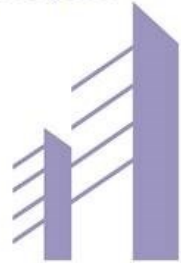
## \*\*JOURNAL\*\*

Patrick Duffy, IAO, Editor, IAO Journal  
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