

**NEW YORK STATE ASSESSORS' ASSOCIATION
AND
THE INSTITUTE OF ASSESSING OFFICERS**

SEMINAR ON APPRAISING

**JULY 16-20, 2018
RAMADA INN – ITHACA, NY**

SEMINAR INFORMATION

PAYMENT PROCEDURE - A check for the total amount due or completed voucher, ready for signature, must accompany the registration form.

REGISTRATION - The registration form should be filled out and mailed as soon as possible – class sizes are limited. All registration forms are expected to be submitted by July 1, 2018. Member status as of July 1, 2018, will be used to determine the appropriate fee.

CANCELLATIONS- Applicants who cancel before July 1, 2018, will receive a full refund. After July 1, 2018, there will be a cancellation fee of \$75.00.

ON SITE REGISTRATION - All students attending the five and four day classes and the first half-week two day courses will be expected to register at the Ramada Inn north lobby on Sunday, July 15th between 2:00 and 5:00 PM. Classes will begin promptly at 9:00 AM Monday morning. Commuter registration will occur on Monday morning from 8:00 AM to 9:00 AM. If you are attending only a second half-week course, you may register on Wednesday, July 18th between 8:00 AM to 9:00 AM in the same location.

SOCIAL ACTIVITIES – *Included to those registered at no cost*

Sunday, July 15th - A **Welcome Reception and Picnic** will be held at **Stewart Park** from 6:00 to 8:30 PM.

Wednesday, July 18th – A **Cocktail Reception** around the Pool at the Ramada from 5:00 to 6:30 PM.

Remember everyday there is an informal gathering pool side after class

Please RSPV for these events on the Registration Form.

HOUSING & MEALS - **All housing accommodations are your responsibility.** The Seminar headquarters will be the Ramada Inn (607) 257-3100. Other area hotels in close proximity: Clarion (607) 257-2000, Holiday Inn (607) 272-1000 and Econo-Lodge (607) 257-1400. Make sure you mention you are with the conference to get the best rate. We have a special rate at the Ramada Inn of **\$124.95** per night. Dining facilities are available at hotels, campus dining halls, and other fine area restaurants. Costs of meals are the responsibility of the student and are not included with tuition costs.

IAO RECERTIFICATION AND ORPS CONTINUING EDUCATION CREDITS - One credit will be awarded for each classroom hour.

DOS CONTINUING EDUCATION CREDITS - Continuing education credit from the Department of State, is **pending** for the following courses: 12 CE Credits - Valuation of Affordable Housing, Retail Trends – Vacant Buildings, Big Box, Mixed Use, Historic Tax Credits, Ratio Studies, Ethical Negotiations for Assessment Appeals. 24 CE Credits - Advanced Applications Of The Three Approaches to Value/Case Study. 30 CE Credits - Appraisal Principles and Procedures and Application of the Three Approaches to Value.

ADDITIONAL REQUIREMENTS - Necessary workbooks included with the cost of the course; **the exception** is the textbook for the two Basic Valuation courses. Please bring calculator to class. HP12c or equivalent is required for both valuation courses.

REIMBURSEMENT - Eligible Assessors and County Directors who attend will receive continuing education credit and reimbursement from ORPS pursuant to their current rules and approval by the Department of Budget.

ALL ON CAMPUS STUDENTS will be provided with a parking pass to the Cornell CC Parking Lot and a bus pass to campus.

2018 COURSE OFFERING DESCRIPTIONS

Appraisal Principles and Procedures: 5 Days With Exam For Basic Certification –

This is an introduction course of instruction in the appraisal of real property, emphasizing legal considerations, economic principals, real estate markets and analysis. At the conclusion of this course the student will understand the basic terms, concepts and principles applicable to valuation; the appraisal process and its steps; apply the valuation process and its steps to course exercises and to “real world” situations. (This course is a requirement for assessors seeking basic certification from ORPTS). **Instructor – Warren Wheeler, IAO.**

Application of the Three Approaches to Value: 5 Days With Exam For Basic Certification –

This is an intermediate course of instruction that will build on assessors’ knowledge of basic appraisal procedures and the use of the three approaches to value. At the conclusion of this course the student will understand and be able to apply the three approaches to value and reconcile the three approaches to value into a final value opinion. (This course is a requirement for assessors seeking basic certification from ORPTS).

Instructor – Nathan Gabbert, IAO

IAO-1 Assessment Administration from A to Z: 5 Days, Exam –

This course is designed to reinforce assessment administration requirements and appraisal concepts and process for assessors. Students will experience an intense review of legal and calendar administrative requirements for preparing assessment rolls. You will be provided with appraisal principles and procedures, particularly as they apply to the assessment process. Students will be expected to complete a thorough commercial appraisal problem in conjunction with the comprehensive review of the three approaches to value. It is an excellent course for those who plan to take the IAO examination. PLEASE NOTE: Signing up for this course does NOT sign you up for the IAO exam. **Instructors: Cathy Conklin, FIAO & Denise Trudell, IAO.**

Advanced Applications of the Three Approaches to Value: 4 Days, No Exam -

This course will review the principles and techniques used by an assessor or appraiser in the preparation of an appraisal utilizing the three approaches to value. Advanced application of the three approaches to value will then be discussed. A commercial property will be selected and the next four days will encompass the data collection, including a field inspection of the subject property, land valuation, a value determination by The Cost Approach To Value, The Sales Comparison Approach To Value, and the Income Approach To Value. Finally, the value determination derived from the three approaches to value will be reconciled into a final Fair Market Value determination. **Instructors: Edye McCarthy, IAO& David Briggs, FIAO.**

Beginner / Intermediate Microsoft Excel & Word Training: 4 Days No Exam -

The course will focus on the use of Microsoft Excel and Word products in the Assessors’ office. The Word portion of the class will focus on headers and footers, files, mail merges, graphics and working with templates. You will also discover the ease you can create, edit, add and delete graphics. In the Excel portion you will learn to create, move, size, and embed columns, rows, and bar and line charts. Also instruction on how to create templates, lock and unlock cells, protect worksheets and workbooks, copy and move worksheets. You will also learn to how to create and freeze headings, manipulate clip art and various valuation applications. **Instructor – Patrick Duffy, IAO.**

Fundamentals of Mass Appraisal: 3 Days No Exam -

Mass appraisal is a method to study and value a large number of properties. It allows us to group properties in many different ways and analyze the results. This course is the basic course prepared by the New York State Office of Real Property Tax Services with input from assessors and county directors. It has been rewritten to include new areas of emphasis and delve deeper into systematic analysis and valuation. **Instructors – Anne Sapienza, IAO / Chris Banister, ORPTS.**

Wireless Communication Site Valuation: 2 Days, Monday – Tuesday, No Exam –

This course is designed to review and discuss valuation and data requirements and valuation methodologies for wireless communication sites and equipment. The course material and discussion will also include legal opinions related to the classification of cell site assets for property tax purposes. Examples of specific sites will be used to demonstrate various components and valuation exercises. Cost and Income Approaches to Value will be developed, including land rent capitalization and present value of lease payments techniques. A review discussion of market trends and sale prices will also be included. **Instructor: Gary McCabe, CAE**

Ethical Negotiation for Assessment Cases: 2 Days, Monday Tuesday, No Exam -

This is a two day seminar where we explore the process and the techniques for negotiating a settlement for tax certiorari cases. We all negotiate almost every day of our lives, whether we are aware of it or not. There are many skills and techniques that we use and are used against us every day. In this seminar we learn a process of formal and ethical negotiations, and understand the position of the players.

We will learn to separate the personalities from the problems, learn to use objective criteria, and identify the dirty tricks often used in negotiations. We will engage in some case study role playing to understand the how of ethical negotiating.

Who should attend? Anyone with interest in how to mediate an acceptable outcome of a tax certiorari case.

Instructor – John Zukowski, MAI, IAO, SRA.

Valuation of Affordable Housing: 2 Days Monday Tuesday, No Exam -

Affordable housing has grown to comprise a substantial segment of the housing industry today and it is one of the great “buzz words” heard throughout the State. Many jurisdictions have affordable housing projects already in place and if you don’t yet, it is probably coming to you soon. As an Assessor and Appraiser, you have the responsibility to value this type of property using industry wide acceptable methods. We will discuss those methods as well as the laws that govern the Assessment process under RPTL 581-a.

We will follow the money trail of the Low-Income Housing Tax Credit Program, from the Government Agencies to the developers of Affordable Housing. There will be a discussion of the three approaches to value and why the income approach is preferred by the appraisal industry and required by assessors. We will reconstruct I&E statements and discuss proper capitalization rates. This class should be helpful and educational to all assessors and appraisers. **Instructor – Thomas Frey, FIAO, RES, AAS.**

Retail Trends – Market Studies, Gone Dark Properties, Mixed Use, IDA Issues & Historic Tax Credits: 2

Days, Wednesday Thursday, No Exam -

This two day seminar is designed to bring the assessment and appraisal profession up to speed with the most recent changes and trends in commercial retail. Topics to be discussed include, market studies, national and submarket trends.

Historic tax credits, exemptions, IDA’s topics will be brought into the mix, along with controversial valuation of gone dark retail. This seminar will top off with a case study so bring a calculator.

This seminar is for all levels of assessment and appraisal professionals, entry level to seasoned assessors and appraisers. **Instructor – John Zukowski, MAI, IAO, SRA.**

Ratio Studies and How Assessors Can Use Them: 2 Days, Wednesday Thursday, No Exam -

This course will include a thorough discussion of how to do a Sales Ratio Study. There will be a review of the laws governing Uniform percentage of value and the Level of Assessment as well as the relationship between LOA and the Equalization Rate process. You will learn the basic steps in a Sales Ratio Study, from the purpose and objective to the evaluation and use of the results. In today’s real estate market, you need to be knowledgeable in the way Sales Ratio Studies are performed and how to interpret the results when determining your LOA and defending your Equalization Rate.

We will also cover sales analysis, sampling, timing of studies, use of study results, statistical testing and assessment regressivity and progressivity. This class will discuss a court decision where “selective reassessment” was upheld with the help of ratio studies and how it fits into RPTL 305. We will show you how using sales ratio studies can be used to maintain assessment equity in between full reassessments. There will be a small case study to help you learn how ratio studies can be used by assessors. **Instructor – Thomas Frey, FIAO, RES, AAS.**

SEMINAR ON APPRAISING REGISTRATION FORM
CORNELL UNIVERSITY – RAMADA INN - ITHACA, N.Y. - JULY 16 THROUGH JULY 20, 2018
Enrollment is Limited

PRINT, TYPE, OR ATTACH BUSINESS CARD:

Name (First) _____ (Middle Initial) _____ (Last) _____ (Designation) _____

Title _____ Municipality/Company _____

Mailing Address _____

City _____ State _____ Zip _____

Office Phone (_____) _____ Cell Phone (_____) _____ Fax # (_____) _____

E-mail Address _____

Please Check If

PLANNING TO ATTEND THE PICNIC SUNDAY _____ PLANNING TO ATTEND THE COCKTAIL RECEPTION WEDNESDAY _____

Please complete fully and return with FULL PAYMENT or ready for signature VOUCHER to NYSAA.

Select and Check - ONE COURSE OR TWO – 2 DAY COURSES.

COURSES (5 DAY):

1. Appraisal Principles and Procedures** -*Required For Basic Certification* -**CAMPUS**
2. Application of the Three Approaches to Value** - *Required For Basic Certification* -**CAMPUS**
3. IAO-1 Assessment Administration A to Z- **HOTEL**

COURSES (4 DAY): Monday, Tuesday, Wednesday & Thursday

4. Advanced Applications of the Three Approaches to Value/Case Study - **HOTEL**
5. Beginner / Intermediate Microsoft Excel & Word Training – **CAMPUS**

COURSES (3 DAY): Monday, Tuesday & Wednesday

6. Fundamentals of Mass Appraisal – *Required For Basic Certification* - **HOTEL**

COURSES (2 DAY):

Monday – Tuesday – ALL COURSES AT HOTEL

Wednesday – Thursday – ALL COURSES AT HOTEL

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|---|---|
| <ol style="list-style-type: none"> 7. <input type="checkbox"/> Wireless Communication Site Valuation 8. <input type="checkbox"/> Ethical Negotiations for Assessment Cases 9. <input type="checkbox"/> Valuation of Affordable Housing | <ol style="list-style-type: none"> 10. <input type="checkbox"/> Retail Trends – Market Studies, Gone Dark Properties, Mixed Uses, IDA Issues and Historic Tax Credits 11. <input type="checkbox"/> Ratio Studies & How Assessors Can Use Them |
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TUITION:

5 DAY COURSES

- \$450.00 for members of the I.A.O.
- \$470.00 for members of the N.Y.S.A.A.
- \$550.00 for nonmembers of the N.Y.S.A.A.
- \$55.00 for *The Appraisal of Real Estate Textbook* ←

3, 4 OR TWO 2 DAY COURSES

- \$380.00 for members of the I.A.O.
- \$400.00 for members of the N.Y.S.A.A.
- \$480.00 for nonmembers of the N.Y.S.A.A.

****Text Book Required for Courses 1 & 2**
The Appraisal of Real Estate, 12th Edition Appraisal Institute

SINGLE 2 DAY COURSE

- \$240.00 for members of the I.A.O.
- \$260.00 for members of the N.Y.S.A.A.
- \$320.00 for nonmembers of the N.Y.S.A.A.

Make Checks Payable To: New York State Assessors' Association
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