

## **Proposed approach to shared assessing - New Paltz and Esopus**

**Short term: Train, familiarize, integrate.** Begin intensive training with the appointed Assessor's Clerk in New Paltz, a seasoned Building Department employee, two days a week starting August 1, 2022 (Patty may be available earlier), through the end of the year.

- **Train clerk.** This would entail two hours a week of "hands on" training twice a week. My assistant, Patty Smith, the Assessor's Clerk in Esopus, and I would come to the Assessor's Office in New Paltz to provide guidance and training. Examples: How to navigate RPS, verify county sales, make weekly sales data entries, record/correct/process exemptions, help residents with STAR, process school tax adjustments in RPS, handle common inquiries, create new digital records from scratch, manage splits/subdivisions, etc.
- **Evaluate, familiarize.** My focus as Assessor is to orient myself to the office set up, manage in flight assessments/inquiries, navigate the terrain, and evaluate opportunities.
- **Coursework.** During this period, the NP Assessor's Clerk would be responsible for taking the online course "Fundamentals Assessment Administration" during work hours (while prioritizing visitors and resident inquiries) and scoring a 90% or better.
- **Schedule.** Proposed training days are Monday and Tuesday evenings from 4:30 to 6:30 PM, schedules permitting.

**Medium term: Shared appointed Assessor.** Assuming the parties are agreeable (TBC prior to the New Paltz/Esopus tentative budget) a contract would be developed regarding the permanent appointment of a shared Assessor. Keys to success:

- **Municipality software.** It is believed that New Paltz, like Esopus, has a current contract with Municipality for permit tracking software. Critical to the success of a shared Assessor is the Building Department and Planning Office's commitment to the consistent use of the Municipality software platform for processing all permits, CO's, inspections, site plans, and pictures. The Assessor's access to this database is key.
  - **Better integration and utility.** Municipality's "Assessor" module, an add-on to the program already in use, should be evaluated in both Municipalities for better integration of records.

**Long term: Prepare for a future reval.** Both Esopus and New Paltz Supervisors have expressed reservations about commencing a near-term reassessment in light of the economy. Understandable. The last reval in both municipalities was 2013-2014. Assessments have not been adjusted since that time, except in rare circumstances. Both municipalities lack the data to support a reval without focused data collection and neighborhood trending/realignment over many, many months.

Given this starting place, it's not possible for either municipality to commence a reassessment for at least 2+ years. But that shouldn't prevent officials from planning and preparing now. My suggestion is to leverage the economies of scale in both towns (and possibly others) and make a budgetary commitment this year. While Federal monies are available now, it would be prudent to set aside funds for a reval in 2-3 years, with preparations to begin in 1-2 years. Exact start of full reval TBC—weighing factors such as the market, economy, and political will.

My role as Assessor would be to oversee the bidding process (RFPs prescribed by ORPTS), screen vendors, negotiate, arrange presentations with management, prepare public-facing documents, and work with the vender to prepare data for a fair and balanced revaluation that meets the goals of each municipality.

In-house reval options can be explored. However, an in-house reval requires the building up and training of full-time, dedicated personnel over several years. My impression is that the towns are looking to optimize resources and create efficiencies, not add new headcount over the course of several years.

Look forward to your feedback and happy to tailor the above as needed.

Best,

Shannon

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# Shannon Harris

## Assessment Consulting Services

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### Scope of Work

Ensure that the Town and Village of New Paltz has a successful 2023 assessment cycle while in transition to a new Assessor. Consult, advise, and make recommendations on assessment administration items (approximately 4 hours per week of Assessor time and 4 hours a week of clerk training time). This includes on-site handling in-flight assessment needs and requests, in-person training of a new clerk, reviewing the 2023 department budget, and identifying areas opportunity for the office. Please see attached proposal for context beyond the following:

- Collect permit, plans and mapping data from the NP Building Department, NP Planning Board, and Ulster County Real Property.
- Document changes since the last roll, physically inspect external improvements as needed, and assign new assessed values that reflect equity.
- Periodic conference calls as needed with NP Clerk trainee to capture incoming requests.
- Ensure all property sales and deed transfers are verified, recorded, and filed.
- Ensure exemption inquiries are handled and by training new clerk to process and verify applications.

**Additional Service:** To the extent Small Claims Assessment Review (“SCAR”) representation is needed, represent the Town of New Paltz in any challenges. Depending on complexity and hearing officer proclivity/preferences, liaise with an independent appraiser to review case history, conduct an inspection, review data/comps, and prepare a defense for a Zoom or in-person hearing. **\$250 per parcel, plus an independent appraisal fee to ensure assessment remains intact.**

### Personnel / Rate

Patty Smith, Esopus Assessment Field Worker, hourly rate: \$25/per hour  
Shannon Harris, Assessor, hourly rate: \$100/per hour

### Schedule

- Patty Smith – tentative start date as soon as July 18, 2022, until contract terminated by either party.
- Shannon Harris – tentative start date as soon as week of July 25, 2022, until contract terminated by either party. Note: pre-scheduled personal leave requires my absence from August 2-12.