



**65th Annual
School for
Connecticut
Assessors &
Boards of
Assessment
Appeals
June 2-6, 2008**

Sponsors:

Certified Connecticut Municipal Assessor Committee
Office of Policy and Management
Connecticut Association of Assessing Officers
Academic Partnerships and Special Programs,
University of Connecticut



415373
University of Connecticut
Academic Partnerships and Special Programs
Center for Continuing Studies
One Bishop Circle, Unit 4056
Storrs, CT 06269-4056

65th Annual School for Connecticut Assessors & Boards of Assessment Appeals June 2-6, 2008

The school has a dual purpose: to provide an educational program for those interested in the Certified Connecticut Municipal Assessor (CCMA) designation and to serve as a forum where assessors can present and explore solutions to professional challenges.

The 2008 School offers six courses and an advanced workshop that will run simultaneously. The School is open to all Connecticut assessors, members of boards of assessment appeals and other residents concerned with the problems of property tax administration on a space-available basis.

Certified Connecticut Municipal Assessor Courses

Courses meet Monday through Thursday from 8:30 a.m. to 12:00 noon and from 1:00 p.m. to 4:30 p.m. Exams are held Friday morning. In lieu of an exam, CCMA Revaluation Course students will attend Friday morning's Connecticut Assessment Workshop. All participants, including those in the workshop, should bring an HP12C calculator to the school, esp. those enrolling in CCMA III.

CCMA IA

Assessment Administration

This course is intended for newly-elected assessors, assessor clerks, new staff members and others interested in earning the CCMA designation. Along with CCMA IB, this is an appropriate course for first-time attendees.

Content:

- ▲ Introduction to state statutes
- ▲ Transfer of title
- ▲ Maintenance of assessment records
- ▲ Exemptions and exempt properties
- ▲ Assessment calendar
- ▲ Common interest ownership

Prerequisites: None

Instructors: **Helen Totz**, CCMA II, and **Barbara Bigos**, CCMA II

CCMA IB

Assessment Valuation

This course is intended for newly-elected assessors, assessor clerks, new staff members and others interested in earning the CCMA designation. Along with CCMA IA, this is an appropriate course for first-time attendees.

Content:

- ▲ Concept of value
- ▲ 490 Valuation (farm, forest and open space)
- ▲ Revaluation
- ▲ Sales ratio and grand list codes
- ▲ Motor vehicle assessment administration
- ▲ Personal property assessment administration
- ▲ Miscellaneous valuation problems

Prerequisites: None

Instructors: **Patricia G. Hedwall**, CCMA II, CAE, CCA, SPA and **Brian Smith**, CCMA II

CCMA Revaluation Course

This course is intended for attendees who wish to gain deeper insight to the revaluation process.

Content:

- ▲ Requests for proposals and contracts
- ▲ Public and media relations
- ▲ Statutory framework
- ▲ Preliminary valuation review
- ▲ Ratio studies
- ▲ Mass appraisal techniques

Prerequisite: CCMA IA, IB, IIA, IIB

Instructors: **Steve Juda**, CCMA II and **Roger Palmer**, MAI, CCMA II

CCMA IIA

Introduction to Appraisal Principles

Content:

- ▲ The appraisal process
- ▲ Legal concepts and theory of value
- ▲ Land valuation
- ▲ Cost approach to value
- ▲ Measuring and listing

Prerequisites: CCMA IA and CCMA IB

Instructors: **Thomas F. Browne**, CCMA II, **William H. Gaffney, III**, CCMA II and **Paul W. Slattery**, CCMA II

CCMA IIB

Application of Valuation Techniques

This course is open to attendees who have completed the prerequisites below, and to others on a space-available basis.

Content:

- ▲ Mathematics and statistics
- ▲ Cost schedules
- ▲ Revaluation concepts
- ▲ Commercial valuation
- ▲ Sales comparison approach to value

Prerequisites: CCMA IA, IB and IIA

Instructors: **Michael A. Bekech**, CCMA II and **Walter E. Topliff**, CCMA II

CCMA III

Income Approach to Value

Content:

- ▲ Income capitalization
- ▲ Capitalization and discount rate development
- ▲ Mortgage equity and bond of investment
- ▲ Residual techniques
- ▲ Discounted cash flow analysis
- ▲ Financial functions

Prerequisites: CCMA IA, IB, IIA, IIB

Instructors: **Bill O'Brien**, MAI, CCMA II and **Christopher Buckley**, CCMA I

Connecticut Assessment Administration Workshop

Sessions will be offered daily from 8:30 a.m. to 12:15 p.m. and 1:30 p.m. to 5:00 p.m. All workshop participants may earn up to 31 hours of recertification credit. To receive credit, sign-in/out requirements must be met for each workshop. You may register for the week or by the day.

Monday (7 hours) **IAAO Forum 929 – Preparation of Data for Analysis for Modeling.** *John F. Ryan*, CAE, JF Ryan Associates, Inc.

Tuesday a.m. (3.5 hours) **What You May Not Know About Records Retention and How it Relates to FOI.** *Eunice DiBella*, Administrator, Connecticut State Library Public Records. *Tom Hennick*, Public Education and Information Officer, Freedom of Information Commission.

Tuesday p.m. (3.5 hours) **Attorney General Richard Blumenthal - Veteran's Exemptions.** Attorney General *Richard Blumenthal*. *Helen Totz*, Deputy Assessor, City of Hamden.

Wednesday a.m. (3.5 hours) **Alternative Avenues of Assessment.** *Jeffrey Cohen*, Associate Professor of Economics, University of Hartford. *Eileen Daily*, Chairperson, Finance, Revenue and Bonding Committee. *Ted Gwartney*, Assessor, Town of Greenwich.

Wednesday p.m. (3.5 hours) **Communication Skills for Addressing Media and Constituents.** *Gina Ohanesian*, President, Performance Alternatives, LLC.

Thursday a.m. (3.5 hours) **What is Taxable and Why?** *Brian Smith*, Assessor, City of East Hartford. *Charles Feldman*, President, Charles B. Feldman and Associates, LLC. *Paul Fria*, Assessor, Town of Westport.

Thursday p.m. (3.5 hours) **Commercial Motor Vehicle Valuation: Trucks, Trailers and Exotic Cars.** *Brian Smith*, Assessor, City of East Hartford. *Patrick Sullivan*, Assessor, Town of Simsbury. *Lawrence Lebel*, Assessor, Town of Manchester.

Friday a.m. (3 hours) **Legislative Update.** *John Rappa*, Principal Analyst, Office of Legislative Research. *Kathleen Rubenbauer*, Legislative Program Manager, Intergovernmental Affairs Unit, Office of Policy and Management. *Steve Kosofky*, Assessor, Town of Windsor. *Tony Homicki*, Assessor, Town of Darien. *David Dietsch*, Assessor, City of Waterbury.

Potpourri

Check-in and Registration

Please note that Sunday afternoon and Monday morning check-in and registration will be held in the lobby of the Nathan Hale Inn and Conference Center located on South Campus. Tuesday-Friday morning check-in and registration will be held in the lobby of South A Campus Residence Hall adjacent to Parking Lot S. Check-in and registration begin at 3:00 p.m. on Sunday and 7:30 a.m. on Monday-Friday.

Overnight Accommodations

On campus housing is available in the South Campus Residence Hall located across from the Nathan Hale Inn. Rates for single accommodations are \$52.50 per person per night, and \$38.75 per person per night for double accommodations. Residence Hall accommodations consist of a suite with 2 bedrooms, shared common area and shared bath. Single accommodation is defined as one person per bedroom. Double accommodation is defined as two people per bedroom. If you are interested in residence hall accommodations, please indicate your request on the registration form.

Parking

Campus parking permits are required for Summer Conference Parking. If you need a permit, please check the designated "I Will" box on the registration form. Permits will be sent with your confirmation packet. Overnight guests of the Nathan Hale Inn may park in the hotel's parking lot. Hotel parking permits may be obtained from the front desk at check-in.

Sunday Night Welcome Reception

Start Assessors School off early with a welcome reception at 6:00 p.m. at the Nathan Hale Inn and Conference Center. Reservations and tickets not required.

Monday Night Dinner

Enjoy an old-fashioned New England Clambake at the Nathan Hale Inn and Conference Center Pavilion at 6:00 p.m. To assure your reservation, please order your tickets on the registration form. Tickets will be included in your registration packet.

Tuesday Night Reception and Banquet

Join your colleagues for a lovely evening in the beautiful Rome Ballroom on South Campus at 6:00 p.m. Entertainment provided by Manifestly Excessive. Please order your tickets on the registration form. Tickets will be included in your registration packet.

Thursday Night Farewell Picnic

All attendees are invited to a picnic/barbecue at the Nathan Hale Inn and Conference Center Pavilion at 5:30 p.m. Please dress casually.

Texts

The required texts for CCMA IA and IB are *Handbook for Connecticut Assessors, and Statutes Pertaining to Assessment and Collection of Local Property Taxes*. The Handbook will be available for purchase for a fee of \$60.00 on Sunday afternoon, June 1 and Monday morning June 2 at the registration table located in the lobby of the Nathan Hale Inn and Conference Center. If you need to purchase the "State Statutes", they must be ordered in advance and paid for with your registration (see brochure registration form). The "Statutes" will be distributed Sunday afternoon and Monday morning at the registration table located in the lobby of the Nathan Hale Inn and Conference Center.

The required text for CCMA IIA, IIB and III is *Property Assessment Valuation*, 2nd edition. If you need to purchase this book, it must be ordered in advance and paid for with your registration (see registration form). Books will be distributed Sunday afternoon and Monday morning at the registration table located in the lobby of the Nathan Hale Inn and Conference Center.

Suggested text for CCMA Revaluation Course is *Mass Appraisal of Real Property*. To purchase, contact IAAO directly.

IAAO

The Connecticut Chapter of IAAO will hold a meeting on Wednesday, June 4 from 6:00-7:00 p.m. in the Mansfield room at the Nathan Hale Inn and Conference Center. All are welcome.

Cancellation/Refund Policy

If you are unable to attend, you must withdraw by calling the Student and Financial Services office at 1-877-892-6264 (toll free) or 860-486-4905 during office hours Monday-Friday, 8:30 a.m.-4:30 p.m. The registration fee, minus a \$35 processing fee, is refundable if you call by May 28, 2008. For participant substitutions, please contact Linda Friedman, 860-486-9318.

For questions and additional information, please contact Linda Friedman, Program Manager, at 860-486-9318 or linda.friedman@uconn.edu

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65th Annual School for Connecticut Assessors and Boards of Assessment Appeals

June 2-6, 2008 Return registration form by May 28, 2008

Mr./Mrs./Ms. _____

SS # _____

(Optional: Will be used only as your student ID number)

Title (i.e., Assessor, Appraiser, etc.) _____ (Required)

Town/Organization _____

Preferred mailing address work home

Street _____

City _____ State _____ Zip _____

Work Phone _____

Home Phone _____

Cell Phone _____

Fax _____ Email _____

To ensure your full participation, please notify us of any accommodation necessary for a special need or disability.

Method of Payment

Enclosed is a check or money order payable to UConn

Purchase Order # _____

MasterCard VISA Discover Diners International

Card # _____

Exp. Date _____

Cardholder's Signature _____

MAIL: Complete your registration form, enclose payment in full, and mail to: University of Connecticut, Student and Financial Services, Assessors School 2008, One Bishop Circle, Unit 4056, Storrs, CT 06269-4056

FAX: Dial 860-486-0272 (secured line). Remember to complete your credit card information authorization.

ONLINE: continuingstudies.uconn.edu/professional/assessor/index.html (social security number required)

PHONE: Call 1-877-892-6264 or 860-486-4905. Please have your credit card information ready.

Important Payment Information for Use of Purchase Order: If you plan to use a Purchase Order to complete online registration you must receive prior validation. Please call 1-860-486-2947 and have the Purchase Order number, maximum amount of Purchase Order, valid start and end date, the issuing city/town, institution or company name, address, and contact number ready.

Weeklong Registration

Includes Sunday night Welcome Reception, all handouts, 5 lunches, morning and afternoon refreshments and Thursday night farewell picnic.

CT Assessment Workshop \$335.....

Or

CCMA Courses

Includes CCMA enrollment fee. \$345

I would like to enroll in the following course:

IA IB _____

"State Statutes" - add \$20.00 _____

IIA IIB III _____

"Property Assessment Valuation" - add \$27.50 _____

Or

CCMA Revaluation Course \$335.....

Total.....

Per Day Registration

for Connecticut Assessment Administration Workshop

Please circle M T W TH F

Monday \$130

Tuesday - Thursday Total at \$100 per day

Friday \$50

Total

OPTIONS FOR BOTH

Weeklong and Per Day Registrants

Monday Night Clambake - Nathan Hale Pavilion

Add \$35 per person.....

Tuesday Night Reception and Banquet -

Rome Ballroom

Indicate Choice of Entree: Surf and Turf Chicken Chardonnay

Stuffed Shells Florentine

Add \$40 per person.....

Residence Hall Accommodations at South Campus

Please circle: S M T W TH

Please check:

Single @ \$52.50 per person per night.....

Double @\$38.75 per person per night.....

Thursday Farewell Picnic

I will attend the picnic

I will not attend the picnic

Campus Parking Permit

I will require a parking permit I will not require a parking permit

Overnight guests of the Nathan Hale Inn may park in the hotel parking lot. Please obtain a hotel parking permit upon check-in.

Total enclosed.....