



VALA
SPRING
NEWS-
LETTER

May 1

2016

- ✚ **What is your local DA
Up To?**
- ✚ **Upcoming Education**
- ✚ **Lister Tips & History**
- ✚ **Who will be 2016's
Lister of the Year?**
- ✚ **Interview with Randy
Viens**



Your Local District Advisor

District Advisors are a great resource for your local Listers and Assessors; with access just a phone call away through a dedicated "hotline" (828-6887). These experienced officials are able to offer advice and direction on some of the complex issues dealt with in the office on a day to day basis. With only 7 advisors covering the entire state its reassuring that most questions can be answered that day over the phone. The outline below are the responsibilities of your local DA throughout the year.

Equalization Study/Review of Grand Lists

At Town Office

- ✚ Go through each sale (1 year of sales each year, 3 years of sales for reappraisal year)
 - Check listed value at time of sale
 - Check if Property class, category, acreage correct
 - Collect subdivision information (new listed value, acreage & category)
 - Is sale valid or invalid?
 - ♦ Research each sale to verify validity
 - ♦ Look at documentation (deed, map & verifications letters) if invalid

At State Office

- ✚ Equalization file for each town--supervisor
 - Look for any anomalies on the three years of sales (missed from prior year – subdivision, category correction, acreage change et al)
- ✚ Finalize Equalization Study for mailing to towns by end of year

Review 411, the Grand List Summary Sheet

- ✚ Check for category errors
 - Understanding use of Other, UO, Woodland and R1/2 vs S1/2 categories in each town
 - ♦ Updated Utility categories (UE & UO) in each town
- ✚ Check for exemption errors
 - Voted exemptions expiration dates & do they qualify
 - Non-Taxable exemptions do they qualify
 - Veterans Exemptions (list from VOVA)
 - Solar exemptions
- ✚ Check for corrections and cleanup of the Town's Grand List
 - Category use
 - Consistency of Information in the Grand List
- ✚ Check for Town owned property accuracy
 - Are Town owned properties listed in the Grand List
 - Do they have a realistic value?
 - How did they value each property (used insurance value or assessed value)?
- ✚ Review Fire Districts
 - Are they listed correctly



Current Use

- ✚ Use of NEMRC Current Use program to help listers
 - Are the current use parcels coded correctly?
 - Check Current Use values to assure the town is valuing each consistently
 - Help Listers with the understanding & calculation of current use parcels
 - Help Listers with the process of current use program—allocation of values

Education and Supporting Municipalities, especially with Legislation

- ✚ Develop Lister Workshops & Training Materials
- ✚ Prepare and facilitate Town Officers Educational Conference (TOEC's)
- ✚ Hold Workshops, Trainings & Meetings
 - New Lister Training
 - Advanced Lister Training
 - Data Collection Training
 - Land Schedule Training
 - Current Use Training
 - Understanding the Equalization Study
 - Various TOEC workshops
 - Any new courses to help with legislative changes



VERMONT ASSESSORS & LISTERS ASSOCIATION Nominations for Lister of the Year

VALA established the Michael P. Cyprian, Lister of the Year Award in 1991 to honor Listers and Assessors who demonstrate fairness to all, dedication, helpfulness, worked to improve the listing process and pursued a better education for the assessment community.

Nominated candidates for Lister of the Year must be accompanied with a support letter; submission without letter will negatively impact chances. Feel free to solicit others for their support in making your nomination. Along with the recognition from your fellow VALA members, the winner will receive the Steen Jeffrey Lister of the Year \$250 Education Grant.

Please send nominations to president@valavt.org

EDUCATION FOR 2016

Property Valuation and Review Courses

CURRENT USE: May 9th - South Burlington Police Station

ADVANCED LISTER TRAINING: May 11th - Montpelier Vermont Association of Realtors Building

STATE STATUTES AND RULES OF PROPERTY ASSESSMENT: June 15th - Hartford Town Offices

PUBLIC RECORDS: August 17th - Montpelier Vermont Association of Realtors Building

RECORD KEEPING: August 18th - Montpelier Vermont Association of Realtors Building

DATA COLLECTION: August 30th - 31st and September 6th - 7th - South Burlington Police Department

STATE STATUTES AND RULES OF PROPERTY ASSESSMENT: September 15th - Montpelier (Location TBD)

IAAO Course Selection

IAAO 100 UNDERSTANDING REAL PROPERTY APPRAISALS: September 12th & 13th - Montpelier Vermont Association of Realtors Building

IAAO 155 DEPRECIATION ANALYSES: September 14th & 15th - Lake Morey Resort, Fairlee

IAAO 171 STANDARDS OF PROFESSIONAL PRACTICE AND ETHICS: September 21st - Hartford Town Offices

IAAO 101 FUNDAMENTALS OF REAL PROPERTY APPRAISAL: October 3rd - 7th - St. Johnsbury Comfort Inn

DA ARTICLE CONTINUED...

- ✚ Other topics
 - Instruct/assist towns with their grand list analysis
 - Review and guide municipalities in a statistical analysis of their grand list - Goal of equity and to analyze problem areas - COD & CLA
 - Assist Towns with any legislative changes
 - Assist Towns with understanding the Statutes, Technical bulletins & related laws that effect all aspects of their position

Appraisals

- ✚ Appraise Railroads for State property taxation - In house appraisal
- ✚ Appraise State owned lands held by the Agency of Natural Resources
 - New acquisitions—inspect and value using the sales database
 - Collect open land sales data for state land database in all towns
- ✚ Assist Towns with appraisals and listing issues
- ✚ Assist towns with reappraisal
- ✚ Help Towns with Solar Valuation



VALA COURSES

Registration form on the VALA website

www.valavt.org

**May 13th 9am-4pm,
Preparing for Appeals- Are You Ready?**

Instructor: John Fike

Location: UVM Extension Office, 327 U.S. Route 302
(Barre-Montpelier Road)

Cost: \$50; 7hrs CE VPAC

Topic: Learn the nuts and bolts of preparing for appeals.

**August 8-9th 8am-5pm,
IAAO Workshop 150- Mathematics for Assessors**

Instructor: David Cornell

Location: 171 Bridge Street, White River Junction (Town of Hartford Building)

Cost: \$ TBD 15hrs CE IAAO and VPAC

Required: to Attend: HP12-C calculator

Description: This two-day workshop is designed to provide the student who plans on attending IAAO programs with an understanding of the mathematical concepts and techniques applied in the appraisal and assessment administration disciplines. It is designed for both the beginning student who has limited knowledge of mathematics and those students who wish to refresh their mathematical skills. Topics covered include a review of the basic mathematical functions, negative numbers, decimals, percentages, exponents roots, mathematical notation, algebra, statistics, and graphs. This workshop includes an exam.

Interview with RANDY VIENS

Randy has been involved with real estate for over 30 years. Starting out in the early 1980's as a realtor and transitioning into becoming an appraiser in the mid 80's, watching the art of the Appraisal trade grow through its infancy. The transition from fee work to mass appraisal was a gradual one, originally just helping the town of Georgia on their reappraisal in 1990. Randy worked with Ollie Trahan (the District Advisor at the time) on developing the town's land schedules and performing field work, which led to running for the elected position of Lister.

Randy Viens is currently the main liaison for VALA in the legislature in Montpelier, keeping a sharp eye on what's happening of interest to assessment officials. Randy actively testifies on committees when necessary, typically in the Ways and Means committee. Reporting to VALA members during the winter meetings is especially beneficial, giving VALA a chance to respond in a timely manner while legislation is being crafted.

Being involved with Legislators, Randy has a front row seat to the changing atmosphere and events affecting change to the position of Listers and Assessors alike. Randy feels that most people are unaware of what great influence Vermonters have to affect current bills being legislated. Sometimes it's as simple as calling up the week something is on the floor and asking to be put on the agenda to speak. Committee meetings typically have open doors allowing people to walk-in and participate.

Currently there are some active bills that could have a significant impact in the near future; the proposal of a Valuation Board to hear state level appeals which would replace the current Hearing Officers; Bill H.873 which just passed the House and is now in the Senate Finance Committee (section 6 on page 6 of the bill) would allow education funds of \$100,000 to be held collectively at PVR, allowing education monies to be disbursed on an as needed basis to towns for Lister education [as opposed to the current system where towns can limit access of Listers to education due to lack of funds]).

Randy suggests accessing the Vermont Legislature website <http://legislature.vermont.gov/> to find what is currently going on (usually updated every Monday). The VALA newsletter and website (<http://www.valavt.org>) also can be helpful resources for those wanting to understand VALA's position on new bills being discussed in the House and Senate.



When asked what should be required training, Randy said "Listers and Assessors should become educated, at the very least, in courses such as "An Introduction to Lister duties and Responsibilities, Approaches to Valuation, and Introduction to Property Inspections and Data Collection". It seems that these would be a good foundation and the building blocks of becoming a good Lister or Assessor.

Randy thinks that "One of the hardest things for Listers and Assessors is to be recognized by the public and Select Board members for the work they do". The responsibility of maintaining the Grand List requires several skills, being diligent in monitoring property sales and identifying market trends being just a few. It is important to stay active throughout the year, educating and assisting property owners when they have questions on valuation and or property information. Randy will walk through the process with property owners, offering explanations and market sales where available. In the Essex office there is a sales book where you can look up recent sales allowing property owners to be educated about what's happening in town including recent market sales, For Sale By Owners (FISBO), and other transfers.

Going forward Randy thinks it is important for new Listers and Assessors to be involved in VALA and is encouraged to see County Directors supporting involvement at a county level

LISTER HISTORY

The position of Lister has stood the test of time and was established as a practice prior to Vermont becoming a state. The duties may have changed since inception the one thing that remains is Listers continue to List. So back in the day before statehood, how did you become a Lister???

The Justice of the Peace would nominate people to serve as Lister. If you were nominated you were obligated to serve, or pay a penalty.



LISTER TIP *Listers can reach out to their town's Board of Civil Authority (BCA) in a simple way. Invite your town BCA board members to individually come in to meet with the Listers in order to review and understand their own property records cards. This invitation should be done in the winter months (as opposed when there are ongoing appeals as the situation would tempt exparte communications). Reviewing and explaining the data on record and the valuation process should enhance their grasp of existing values and methodology. This will hopefully encourage more appropriate and rational decisions by the BCA during appeals.*

