

The **Review and Recommendations Workshop** focused on the development of a set of recommendations and next steps for the annual reassessment program based on the findings from the six **Annual Reassessment Resource Requirements Workshop**.

ORPS's senior staff and a subset of the 162 **Resource Requirements Workshops** participants were invited to a centrally located, full-day workshop structured to review the findings and to craft recommendations for action. Participants were drawn from across the state with equal representation from urban and rural jurisdictions as well as large and small counties.

This workshop focused on confirming the themes from the local workshops that were discussed in the previous section, and developing recommended action plans based on those themes. Each of the five themes was presented with illustrative statements from the six workshops to portray how the theme was derived. Participants were then asked, in small work groups, to review the themes to determine if they correctly represented the essence of the dominant clusters from the workshops. The work groups confirmed the themes and made minor modifications to the name given to each theme. The modifications to the theme names have been incorporated throughout this report.

Each participant was then asked to individually rank the sub themes by the priority and “do-ability” of the sub theme as it related to their municipality (see Figure 3).

Figure 3. Do-ability and Priority Matrix

### Priority Matrix

The ranking process provided clear insights into the priority that the participants attached to each of the 13 sub themes and about how do-able each sub theme was considered to be by the participants (see Table 3). **Where the current process works, leave it alone** and **Let the users choose what works best for them** were the only sub themes that were considered to be both of a high priority and highly do-able. Generally, the remaining sub themes were considered of high priority but low do-ability. One interesting result was that the two sub themes **Reassessments should be done on a cyclical basis** and **Build support and cooperation of elected officials** were ranked high priority by 74 percent of the participants, the largest percentage given to any of the sub themes, however, these same two items were considered highly do-able by only 26 percent and 21 percent respectively.

A majority of participants considered almost every finding from the workshop series as a high priority, thus validating the strength of the workshop findings, yet they also were somewhat skeptical as to the “do-ability” of almost all of the sub themes. Important issues were identified, but there is a major gap between the importance and the perceived feasibility of the actions they proposed. This gap reinforces the need for ORPS and local assessors to continue their dialog.

The findings from this ranking process lay a foundation for a set of action plans to investigate and pursue each of the sub themes. Six of the thirteen themes from the high priority list were selected by the participants as the focus for the development of action plans at the workshop. The six sub themes are the shaded rows in Table 3.

Participants were asked to craft a goal statement for each identified sub theme and a set of action steps to reach that goal. Resources required to implement the action plan and barriers to implementation were also identified. Finally, strategies for overcoming each barrier were discussed.

Many interesting discussions were held in the development of these plans. Three critical success factors emerged from these discussions: more effective communication, a commitment to collaboration, and clear concise guidelines. Each of these success factors is discussed below followed by the recommended action plans.

To aid the reader, an action plan process is presented in Figure 4. The figure illustrates that action plans must be developed with consideration of critical success factors, in the context of resources and barriers, and with a clear set of mechanisms for overcoming barriers. The launch point for each action plan is the goal statement that emerged from the workshop results.

### Success Factors and Recommendations

Throughout the **Review and Recommendations Workshop** three factors critical to success consistently emerged from the work groups: the need for collaboration, the need for interorganizational communication, and the need for overarching guidelines or procedures that would provide for structure in implementing the program while allowing for flexibility based on certain criteria (such as municipality size). In each work group, regardless of the assigned objective, these factors were identified as critical to the recommendations presented here for implementation of annual reassessment. Each of the success factors is presented below followed by the six recommendations for action, which depend on these factors for their success.

**Collaboration.** The **Review and Recommendations Workshop** was designed to encourage teams of local assessors, county directors, and ORPS's staff to work collaboratively to develop action plans based on the issues they identified as high priority. The Andersen model had made it clear that collaborative efforts were likely to be the most successful process for implementing annual reassessment. The facilitator's role in each team was to ensure the plans took into account all view points. This process allowed each person to see and hear the impact a task would have on others, and decisions regarding action steps were made with regard to all parties. One interesting aspect of the process was that since both large and small communities were represented in the work groups, the acknowledgment of the impact a task would have on a particular size community (or assessment office) was also considered. In certain instances size had no impact, in others the impact was substantial.

While each work group recognized the need for the creation of an interorganizational task force or work group, it was acknowledged that the process of collaboration was more than assembling a group of people. Each group stated what type of participants would be needed to ensure each constituency was represented. Several groups explored various means to address the high costs of meetings through the use of technology or process. However, very few discussed mechanisms to ensure collaboration through the setting of ground rules or parameters. These will also need to be explored if the collaborative environment experienced at the **Review and Recommendations Workshop** is to continue.

**Interorganizational Communication.** Good communication is crucial to the success of any intergovernmental program. It ensures that all stakeholders are continuously and adequately informed. This is a challenging task, especially for the annual reassessment program, which involves over 1,300 individuals in the assessment community who have different roles, responsibilities, and in some cases, very different constituencies.

It is clear from the workshops, though, that current communication mechanisms need improvement. While there has been no shortage of information being exchanged in this community, there is wide variation among the members of the assessment community as to their understanding of the program in general, their knowledge of options for implementing the program, and the resources available from ORPS and other sources to support that implementation. An integral step in a facilitating interorganization communication would be to agree upon the exact terminology used by ORPS and the local assessment community. Without this understanding, miscommunication is bound to occur. Further discussion and agreement will be required at each step of the process to ensure each party understands and agrees to the terminology used.

Addressing communication issues is an important part of each action plan. Whether it was an internal communication plan between ORPS and the assessment community or an external communication plan to educate the public or elected officials—the call was for one collaboratively developed consistent voice.

**Guidelines.** While many groups called for more flexibility, the same groups expressed the need for guidelines and regulations. Each group said there was a need for standards and even offered various avenues to obtain those standards through best practices research and utilizing the International Association of Assessing Officers (IAAO) standards as a framework. However, each group also asked for flexibility within the standards to allow for options. It was universally stated that there are great variations among municipalities within New York State, and these needs must be recognized and provided for in the creation of any guideline or regulation. Alternatives that take this variation into account have the potential to increase the number of municipalities implementing the program.