Assessors’ Association of Pennsylvania

69th Annual Conference on Assessment Administration

May 3 to 5, 2017
Lancaster Marriott at Penn Square
Registration Materials Inside!

AAP is an affiliate of the County Commissioners Association of Pennsylvania
February 27, 2017

TO: AAP Members
FROM: Angelia Tennies, CPE, President
RE: AAP 2017 Annual Conference Registration

The Assessors’ Association of Pennsylvania (AAP) is pleased to be holding our 69th Annual Conference at the Lancaster Marriott at Penn Square in beautiful and historic Lancaster County. This Conference, scheduled for May 3 to 5, is one of the best ways to earn recertification credit hours with the State Board of Certified Real Estate Appraisers and network with your peers. The enclosed agenda outlines the classes offered and other Conference activities.

CONFERENCE DETAILS

Conference Registration. To register for the Conference, go to the AAP website, www.paassessors.org, and click on the Annual Conference link. You can still register by using the enclosed registration form and mailing it with your check made payable to “AAP” to the address listed on the form. If you have registration questions, please call Lori Lawyer, AAP Administrative Assistant, at (717) 736-4712 or email her at llawyer@pacounties.org.

Hotel Reservations. For online reservations, please visit the link under the AAP Annual Conference link on our website, www.paassessors.org. The Lancaster Marriott link will automatically take you to the group reservation site for our Conference. You must secure your room with a credit card. You can also call the Lancaster Marriott at (717) 239-1600 - remember to mention AAP to receive our Conference room rate!

If you would like to make hotel reservations using the enclosed reservation form, you can still do so. The reservation should be made directly with the Marriott with either a one night’s deposit per room or credit card information. You can email that form directly to lauren.patton-cole@interstatehotels.com. The room reservation deadline is April 11 or when the room block fills up, whichever comes first.

AAP Education Auction! We will be holding our annual auction to benefit the AAP Chapter Education Fund after the dinner on Wednesday, May 3. We are asking each county to donate three items for the auction. All auction contributions are welcome with the following exceptions - any type of tobacco products and ammunition. Auction proceeds benefit the AAP Chapter Education Fund which provides annual education grants to all AAP chapters. In order to organize the auction, AAP will need to know what items your county will be donating. Please send a description of your auction items by April 14 to Terry Cochran at tcochran@pacounties.org.

Officer/Board Appointment. I have appointed Past President Melissa Border as Chair of the Nominating Committee. Nominations for Vice President, Secretary and Treasurer should be sent by April 4 to: Terry Cochran, AAP Deputy Director, at PO Box 60769, Harrisburg, PA 17106-0769 or tcochran@pacounties.org. Please see the enclosed letter from Melissa. Local chapters must also notify Terry about who will be their AAP Board of Governors’ representatives for 2017-2018 (term starts at July 2017 board meeting). If your Chapter hasn’t taken care of this item, please make sure that it is on the agenda for your next chapter meeting.

General Membership Meeting. Please plan to attend the AAP General Membership Meeting on Thursday, May 4, where all AAP members in good standing will be voting for AAP’s next Vice President, Secretary and Treasurer.

Award Nominations. The Awards Committee, chaired by Cindy Treible, Monroe County, is seeking nominations for the AAP Awards. A nomination form and award criteria can be found at the Annual Awards link on the AAP website. Nominations should be sent to Terry Cochran at the AAP office by April 4. Forms for both the AAP annual awards and the service awards are also included in the Conference email blast.

Monitoring Procedures. Included in this mailing is an explanation of AAP’s monitoring and disciplinary procedures. Please read them over before signing up for classes. By registering for classes, you, as an individual, are agreeing to abide by both the monitoring and disciplinary procedures.

I look forward to seeing you in Lancaster.
Wednesday, May 3

8 a.m.  Conference Registration and Coffee Break
8 a.m. - 4:30 p.m.  Exhibits
9 a.m. - noon  Taxpayer Relief Act - AKA Homestead/Farmstead, SS#1-2006 (3.0 hours)
This class will explore the history, requirements and regulations of the program and how it affects school district and potentially, county and municipal taxes.

  Steve Howe, CPE, Director of Assessment, Dauphin County
  Anthony Alu, CPE, Director of Assessment, Luzerne County

Techniques Utilized in Developing Statistical Studies (3.0 hours)
The first part of this class will be a short overview of the sales verification process. Once all sales are verified, the class will then look at statistical methods that are used in the calculation of ratios. The COV, COD and CLR will be discussed along with a detailed explanation of the interquartile trimming method which was recently adopted by STEB/TED. Lastly, students will do a ratio study with a county's sales records; COV, COD and CLR will be determined and discussed.

**Students will need to bring a calculator to this class.

  Charles "JR" Hardester, CPE, Chief Assessor, Lawrence County
  Renee L. Reynolds, Director, State Tax Equalization Board, Pennsylvania Department of Community and Economic Development

Appraisal of Golf Courses (3.0 hours)
The course will present an overview of golf property valuation consistent with the text, Golf Property Analysis and Valuation – A Modern Approach, authored by the instructor.

  Larry Hirsh, CRE, MAI, SGA, President, Golf Property Analysts

noon - 1:30 p.m.  Lunch (Included in conference fee)
1:30 - 4:30 p.m.  Assessment Appeals – A Beginners Guide (3.0 hours)
This seminar is designed to introduce new or less experienced assessors to the appeals process, appeal laws and some policies and procedures.

  Randy Waggoner, CPE, Chief Assessor, Perry County

Anatomy of a House - Residential Construction (3.0 hours)
This course follows the construction of a home during the presentation. The instructor will take the assessor from the deed, subdivision, permitting, site work to framing, electrical, plumbing and heating to the actual finished product.

  Wesley Graham, Senior Project Supervisor, Tyler Technologies, Inc.

Understanding Easements, Right of Way, Eminent Domain & Impact on Value (3.0 hours)
This class covers the definitions and descriptions of eminent domain, the impact on value, examples of easements/rights of way, life estates and eminent domain/condemnation and will also feature an overall discussion on the topic.

  Thomas McKeown, GAA, Michael McKeown Real Estate Inc.

6 p.m.  Dinner/AAP Chapter Education Auction (Included in conference fee)
Don’t forget to bring your county’s items for the auction.
Thursday, May 4

8 a.m. Conference Registration and Coffee Break

8 a.m. - noon Exhibits

8:30 a.m. Annual Membership Meeting
   Presiding - Angelia Tennies, AAP President and Chief Assessor, McKean County

9 a.m. - noon Basic Income Formula V=1/R  (3.0 hours)
   This course will cover terminology associated with the income approach to value. Also the steps in the approach to value will be covered along with reconstruction of the operating expense statements and the determination of the net income. Converting the net income to a value indication using various capitalization approaches and techniques will be discussed and demonstrated.
   **Students will need to bring a calculator to this class.
   Eugene E. Porterfield, GA, CPE, President, Evaluator Services and Technology, Inc.

Understanding Pennsylvania’s Right-to-Know Law (RTKL)  (3.0 hours)
This interactive session provides a comprehensive understanding of the Pennsylvania Right to Know Law, legal obligations, best practices and recent case law.

George Spiess, Chief, Training and Outreach, PA Office of Open Records

PA Act 45, Uniform Building Construction Codes  (3.0 hours)
This course will provide an overview of Act 45 and the resulting Uniform Construction Code. It will focus on the basic requirements of Act 45, the establishment of a statewide construction code and the administrative and design requirements of the International Residence Code. Participants will also learn how the building code can be applied and administered locally.

Robert W. Buddenbohn, Jr., Instructor, Pennsylvania Construction Codes Academy

noon Past President’s Luncheon (Included in conference fee)

1:30 - 4:30 p.m. Basic Tax Math  (3.0 hours)
Our instructor will explain the terms, concepts and formulas used in the day to day operations of a tax assessment office. The class includes examples of all of these concepts.
   **Students will need to bring a calculator to this class.
   Anthony Alu, CPE, Director of Assessment, Luzerne County

6 p.m. Banquet (Included in conference fee)
   Semi-formal dress is requested for the banquet.

Annual and Service Award Presentations

New CPE Recognition

Changing of the Gavel
Friday, May 5

8 - 9 a.m.  Conference Registration and Coffee Break

9 a.m. - noon  Exhibits

9 a.m. - noon  Assessment Office Public Relations and Administration  (3.0 hours)
The class will be in a public forum debate format that deals with public relations issues many assessment office’s face. You will get input from assessment professionals on how to they handled certain issues that arise during the course of the year.

Angelia Tennies, CPE, Chief Assessor, McKean County
Deborah Crawford, CPE, Chief Assessor, Tioga County
Larry Shubert, CPE, Real Property Evaluation Supervisor, Philadelphia County
Charles “JR” Hardester, CPE, Chief Assessor, Lawrence County

Legal Road Map to Assessment Valuation and Procedures  (3.0 hours)
This course will provide a review of the steps in the assessment valuation process as well as an update on legislation affecting assessment offices and cases involving assessment issues.

Joan Righter Price, AAP Solicitor, Eastburn and Gray

noon  Adjournment
AAP 69th Annual Conference  
Lancaster Marriott at Penn Square  
May 3 to 5, 2017

**Full Conference Rates:**  Members - $495  Non Members - $595

*Your registration fee includes Wednesday's Lunch and Dinner, Thursday's Lunch and Banquet, Classes, all Breaks and Materials.*

**Wednesday, May 3**
*Please check the class(es) you wish to attend:*

- [ ] A) Taxpayer Relief Act - AKA Homestead/Farmstead (3 Hours, morning)
- [ ] B) Developing Statistical Studies (3 Hours, morning)
- [ ] C) Appraisal of Golf Courses (3 Hours, morning)
- [ ] D) Assessment Appeals (3 Hours, afternoon)
- [ ] E) Anatomy of a House (3 Hours, afternoon)
- [ ] F) Understanding Easements (3 Hours, afternoon)

**Thursday, May 4**  
*Please check the class(es) you wish to attend:*

- [ ] G) Basic Income Formula V=1/R (3 Hours, morning)
- [ ] H) PA Right-to-Know Law (3 Hours, morning)
- [ ] I) Uniform Building Construction Codes (3 Hours, morning)
- [ ] J) Basic Tax Math (3 Hours, afternoon)

**Friday, May 5**  
*Please check the class you wish to attend:*

- [ ] K) Public Relations (3 Hours, morning)
- [ ] L) Legal Road Map (3 Hours, morning)

**Recertification forms will be issued based on the classes selected.**

**Amount Enclosed $___________**

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2017 AAP ANNUAL CONFERENCE REGISTRATION INFORMATION

(Don’t forget to make a copy of this form for your records)

Name ___________________________________________ Title ____________________________
(as you want it to appear on your name badge)

CPE Number __________________________ County/Firm ______________________________________

Phone __________________________ Fax __________________________

Mailing Address __________________________________________________________________________

Email Address __________________________ Years of Assessment Service _______________________

**REFUNDS:** There will be a $50 service charge for each refund requested before April 21. No refunds will be processed after April 21, 2017. Substitutions are allowed.

Make check payable to “AAP” and return with registration form to: AAP Annual Conference,  
PO Box 60769, Harrisburg PA 17106-0769; phone: (717) 526-1010  fax: (717) 526-1020
Room Reservation Form
Lancaster Marriott at Penn Square
AAP 69th Annual Conference - May 3 to 5, 2017

A one night’s deposit per room is required with this form. Attach your check made payable to the Lancaster Marriott or include credit card information as requested below. The room reservation deadline is April 11, 2017 or until the room block is filled, whichever comes first. If you need to cancel your room reservation, please notify the Marriott at least 24 hours before your arrival. Room cancellations received less than 24 hours before the Conference will result in forfeiture of deposit.

Name __________________________________ County/Firm ________________________________
Address  ______________________________________________________ ________________________
City, State, Zip _____________________________________________ Phone ______________________
Email _____________________________________________________
(Confirmations will be emailed to this address)

ROOM RESERVATION INFORMATION:
Arrival Date__________ (Check-in: 4 p.m.)   Departure Date ___________ (Check-out: noon)

Room Choices* and Rates:
☐ Two Double Beds - $146.52/night (rate includes taxes) for single, double, triple or quad occupancy
☐ One King Bed - $146.52/night (rate includes taxes) for single, double, triple or quad occupancy

ALL rooms are non-smoking

* All rooms selections are requests and not guaranteed.

I am rooming with ______________________________________________________________________
(only if applicable)
If you are rooming with someone, please fill out only one reservation form. One form will make a reservation for both of you.

Special Accommodations Needed: ____________________________________________________

Marriott Rewards #: ________________________________________________________________

Credit Card Payments:
Check type of credit card: ☐VISA ☐MasterCard ☐Discover ☐American Express
Card Number ________________________________    Three Digit Security Code________________
Expiration Date__________ Cardholder's Name Signature ________________________________

Return Room Reservation Form to:
Reservations Department
Lancaster Marriott at Penn Square
25 South Queen Street
Lancaster, PA 17603
Phone - (717) 239-1600

Email form to: lauren.patton-cole@interstatehotels.com
About the Lancaster Marriott at Penn Square
Our Conference hotel, the Lancaster Marriott at Penn Square, is located on the square in thriving downtown Lancaster. The hotel's non-smoking guest rooms provide everything needed for a relaxing stay. Enjoy stunning city views, flat screen TVs, coffee makers, refrigerators and much more. Each comfortable, well-appointed room offers either a king or two double beds and accessible guest rooms are also available.

Parking at the Lancaster Marriott
All Lancaster Marriott overnight guests and Conference commuters should park in the Penn Square Garage, which is attached to the Marriott. All Conference parking is $10/day with in and out privileges.

Marriott Rewards Program and Wifi at the Lancaster Marriott
All overnight guests of the Lancaster Marriott are encouraged to sign up for the Marriott Rewards program. With this membership, you will receive benefits such as free wifi in your room, check-in and check-out availability from your mobile device, and reward points earned for your stay. Please see the link below for information on membership benefits and how to become a member.
Marriott Rewards Program - http://www.marriott.com/rewards/rewards-program.mi

Lancaster Marriott’s Credit Card/Debit Card Policy
If you are using a credit card for your stay at the Marriott, the hotel will authorize it upon check-in for the amount of the stay (room and tax plus $25 for incidentals per day) but your card will not be charged until you check out. If you are using a debit card for your stay, the card will be charged immediately for room and tax plus $25 per day for incidentals. The hotel strongly suggests using a credit card if at all possible.

Lancaster County Visitor Information
www.discoverlancaster.com

Galleries filled with unique sculptures, craft shows showcasing handmade items and theatres full of history are all part of the unique blend of culture and art in Pennsylvania Dutch Country. Local artists display their talents through pieces of art, and seasonal arts and crafts festivals not only provide interesting and detailed pieces, but also give visitors a chance to experience the beauty and heritage that makes the region so special.

The many museums of Lancaster County offer visitors an interactive experience exploring everything from local history to holidays and timepieces. Downtown Lancaster’s art scene is a growing one, and visitors will enjoy the opportunity to explore and experience the blossoming culture and the home of famed artist and Lancaster native, Charles Demuth.

From interactive theatre to drama, the many stages of Pennsylvania Dutch Country offer top-notch performances of all kinds. Enjoy a delicious dinner while watching a musical classic or side-splitting comedy at one of Lancaster County’s dinner theatres. The historic Fulton Opera House provides world-class dramas, comedies and Broadway musicals, and living history takes the stage to tell stories of the Underground Railroad. Sight and Sound Theatres, the largest Christian-based theatre complex in the nation, brings the stories of the Bible to life with breathtaking special effects.
February 27, 2017

TO: All AAP Members

FROM: Melissa Border, CPE, Immediate Past President

RE: Nomination for Offices of Vice President, Secretary and Treasurer
Term 2017-2018

As called for by the Constitution of the Assessors’ Association of Pennsylvania (AAP), Article IV, Section 1, nominations are being accepted and considered for the offices of Vice President, Secretary and Treasurer of AAP for the 2017-18 term.

If you wish to have your name placed in consideration or if you wish to nominate someone else for any of these offices, please submit a resume to Terry Cochran at AAP - mail to PO Box 60769, Harrisburg, PA 17106-0769, fax to (717) 526-1020 or email to tcochran@pacounties.org. If you are nominating a colleague, please be certain they are willing to serve and meet all qualifications as listed below. All resumes must be received by April 4, 2017. Resumes received after this date will not be considered for nomination. If you have any questions, please contact Terry at (717) 736-4734.

AAP Constitution

Section 1
The following Officers of this Association shall be elected at the annual meeting by a majority vote of all members in good standing then present at said meeting:
A. President, President-Elect, Vice President, Secretary and Treasurer.
B. The President, President-Elect and Vice President may not succeed themselves in office.
C. The Secretary and Treasurer may succeed themselves in office for an additional one-year term.
D. No person may be a candidate for an Officer before first serving at least two (2) years on the Board of Directors.
E. They shall all hold over in office until their successors qualify.
F. The President-Elect, and Vice President shall automatically move to a higher office on an annual basis.
AAP Monitoring & Disciplinary Procedure/Policy
(excerpted from the AAP Policies and Procedures)

Section 11 — AAP Monitoring Procedures
a. All AAP sponsored sessions for recertification credit will be monitored by two designated active members to control entrance into and exit from the classroom. The education committee shall instruct the monitors in the proper procedures. Beyond the normal assigned breaks, each student will be allowed ten minutes during the morning session and ten minutes during the afternoon session to be used towards late arrivals and/or unscheduled breaks not to exceed ten minutes per session.
b. Students will be required to sign out and sign in with the monitor noting the times. The official starting time for class shall be the advertised starting time. An official clock/timepiece for each class will be used to record all individual breaks and assigned breaks.
c. Failure to comply with this procedure will result in not being issued a certificate for the seminar.

Section 12 — AAP Board of Appeals
a. The Board of Appeals will consist of three (3) active members and one (1) active member alternate to be appointed by the AAP President and approved by the AAP Board.
b. Appeals from the decision of the designated monitors not to issue a certificate of completion must be submitted with all the facts in writing within ten (10) working days to the AAP Board of Appeals. Written review and final action by the Board of Appeals will be given within thirty (30) days. Copies will be furnished to the student, the President and the Chair(s) of the Education Committee.
c. In the event that the student is dissatisfied with the decision of the AAP Board of Appeals, the student may petition The President and the Chair(s) of the Education Committee within ten (10) working days. The President and the Chair(s) of the Education Committee may pick an additional Officer, so the total may be three people. This group shall be called the AAP Executive Board of Appeals. Final action by the Executive Board of Appeals will be given within thirty (30) days.

MONITOR TRAINING
If you volunteer to be a monitor for the Conference classes, you will be required to attend one of the monitor briefing sessions at 8 a.m. on Wednesday or Thursday during the Conference.
AAP Monitor Volunteer/New CPE/Meal Tickets

Please fill out the appropriate portion(s) of this form and send it in with your registration or send it to Lori Lawyer via fax at (717) 526-1020, email to lawyer@pacounties.org or mail to AAP by April 4, 2017.

Name ___________________________________________ County/Firm ____________________________

Daytime Phone __________________________ Email Address ____________________________

AAP Monitor Volunteer

☐ I want to volunteer as a monitor for the following courses:

1st Choice ____________________________

2nd Choice ____________________________

New CPEs

☐ Yes, I am a new CPE and have not been recognized (must be a member of AAP). I will be attending the banquet on Thursday, May 4, 2017.

Extra Meal Tickets

If you would like to purchase extra meal tickets for a spouse or guest who is not registered for the AAP Conference, please fill out the information below. Remember, if you are registered for the conference, your meals are included in the registration fee. Please make your check payable to AAP.

Please indicate how many extra tickets you will need:

_____ Wednesday Lunch $31

_____ Wednesday Auction/Dinner $39

_____ Thursday Past Pres. Lunch $42

_____ Thursday Annual Banquet $55
AAP EDUCATION AUCTION!

All proceeds benefit AAP chapter education!

Wednesday, May 3

We’re celebrating Cinco de Mayo!

Don’t forget to bring your county’s contributions for the AAP Education Auction to be held immediately after our Wednesday night dinner.

AAP is holding the regular auction plus a silent auction where bidders make their bids on paper instead of with the auctioneer. Our own Larry Shubert from Philadelphia County will be our auctioneer for the evening!

The AAP is asking each county to contribute three items for the auction. All proceeds from this event go to the AAP Chapter Education Fund which benefits all AAP chapters. In order to organize the auction, AAP will need to know what items your county will be donating for the auction. Please send a description of your auction items by April 14 to Terry Cochran at tcochran@pacounties.org.