



2017  
ANNUAL  
MEETING

APRIL 12,  
2017

*Queensbury*  
PROPERTY SYSTEMS GROUP



# 2017 SAMA Annual Meeting

April 12th, 2017

## CEO Update

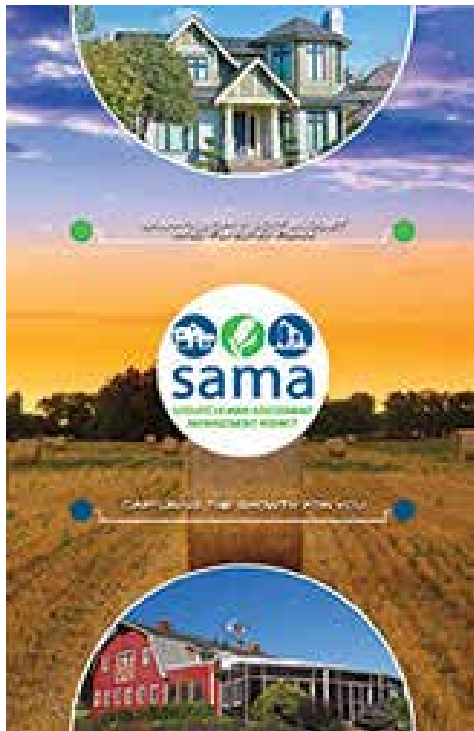
2017 REVALUATION -  
RESULTS & EXPECTATIONS

# Purpose of Assessments



- Assessments pay for essential services that politicians and taxpayers want and need.
- In 2016, the assessment base brought in \$1.9 billion. Over 50% of revenue for municipalities.
- Revenue needs are growing to support growing economy.
- Preserves local autonomy.

# Agency Statistics



- Agency created in 1987
- 7 person Board of Directors
- Assessment governance for entire province
- Assessment services for 760 municipalities
- 840,875 assessed properties
- 8 regional offices
- 151 permanent staff
  - 109 in Assessment Services
    - includes 6 for Moose Jaw contract
- Total cost per property = \$20.99 (includes governance)
- \$18.5M operating costs (2017)
  - Excludes Moose Jaw contract & capital funding for TI program
- Assessments provide \$1.9 Billion Revenue for Municipalities and Education (2016)

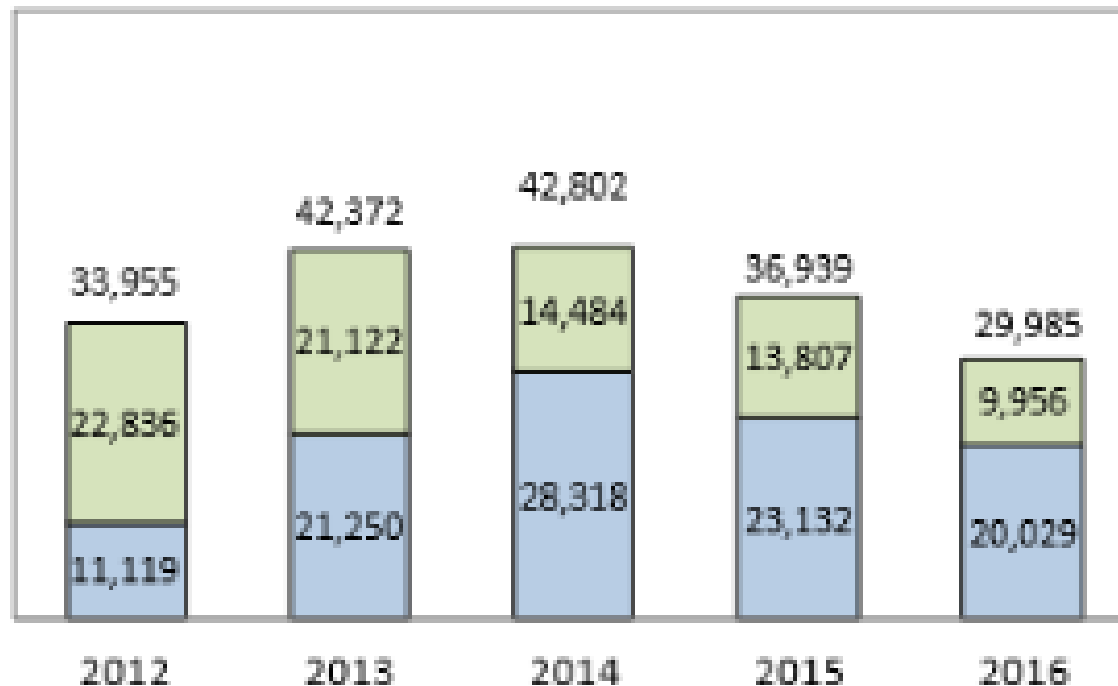
# 2016 Successes

- Received requested funding from client municipalities and status quo funding support from government.
- Successfully delivered revaluation preliminary values to government in April and to our client municipalities between June and November 2016.
- Successfully implemented simplified residential and commercial cost models and Govern 6.1.
- Reviewed/inspected over 62,000 properties.

# Continued Growth

## Annual Maintenance Reviews

Number of Residential, Commercial and Agricultural Properties



- Total reviewed in calendar year
- Reviewed Q3 & Q4 for use in the following year
- Reviewed Q1 & Q2 for use in the current year

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sama

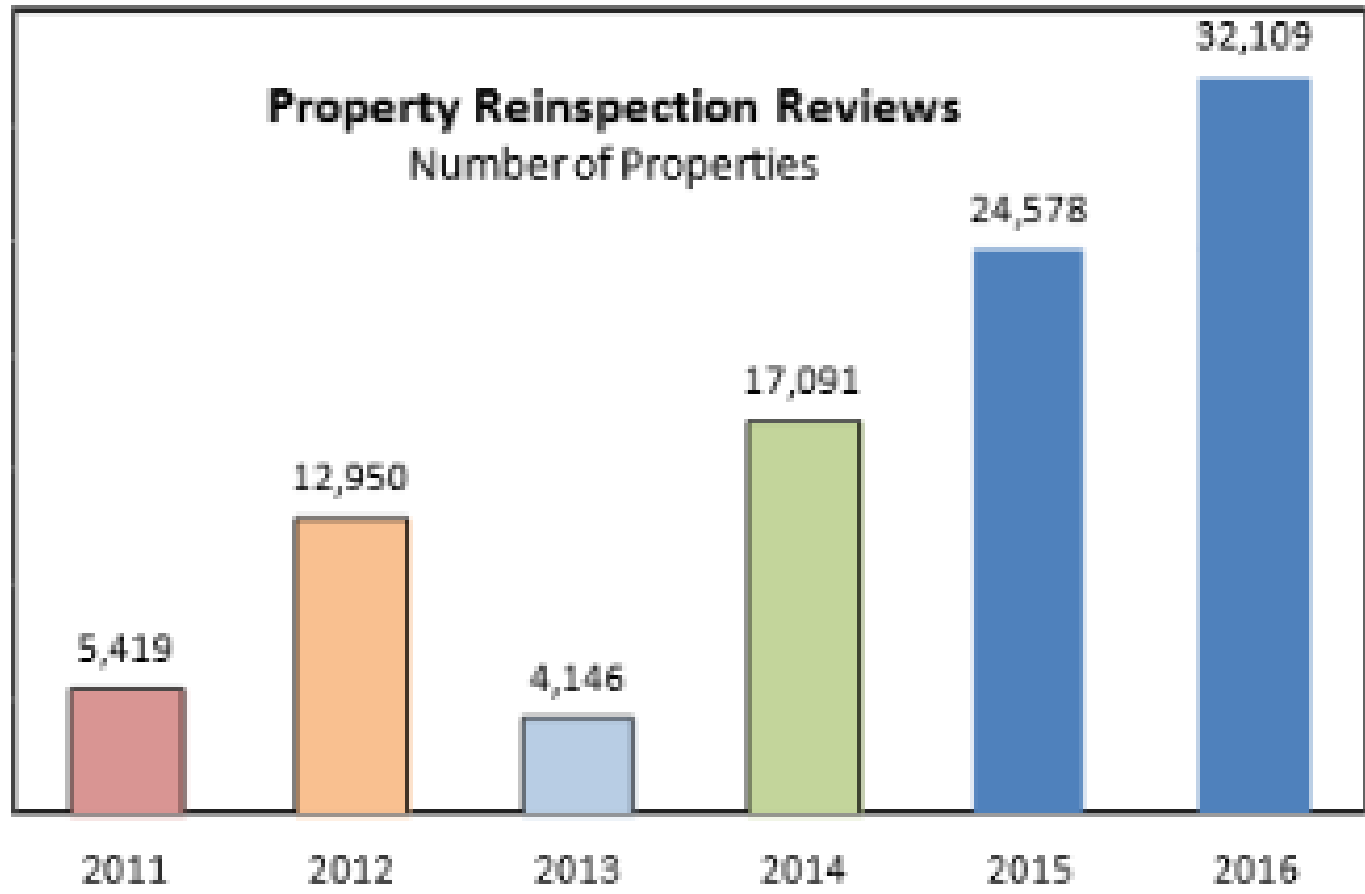
SASKATCHEWAN ASSESSMENT  
MANAGEMENT AGENCY



# Re-inspection Results

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SASKATCHEWAN ASSESSMENT  
MANAGEMENT AGENCY



# 2016 Successes

- New 2018 to 2021 strategic directions established and approved by the Board.
- Developed comprehensive training programs for cost models changes and new computer system and provided staff training to majority of staff prior to implementation.
- Implemented new Govern.net computer system, the foundation for meeting our new Technology Infrastructure objectives, in December 2016.
- Getting information into our new Govern system has improved substantially over the old system; Getting information out in the form of reports has been a different story....

*It took a little longer than expected to "houstrain" our new computer system*





# Our Current Strategic Directions (2014-2017)

1. Establish a new, stakeholder supported funding model for SAMA.
2. Simplify and streamline to improve efficiency and effectiveness.
3. Use policy, process and technology changes together to radically increase property inspections.
4. Strengthen the capabilities of all employees.

# 2017 Budget (Updated)

REVENUES	2016	2017	Var.	% Chg
Prov. Operating	*\$10,238	\$10,238	<del>\$307</del>	+3.0
Prov. Capital	612	612	0	0.0
Municipal Req. Operating	6,763	7,279	516	+7.6
User Fee Charge (\$20/property)	**475	**489	14	+3.0
Municipal Req. Capital	624	624	0	0.0
Other	436	414	-22	-5.0
<b>Total</b>	<b>\$19,148</b>	<b>\$19,656</b>	<b>\$508</b>	<b>+2.6</b>

\*\*Service fee revenue in excess of budget will be transferred to an operational reserve to defray future expenditure and/or increases to the municipal levy. \*Adjusted to actual - 2016 budget request was \$10,545

<b>Operating Exp.</b>	<b>\$18,070</b>	<b>\$18,523</b>	<b>\$453</b>	<b>+2.5</b>
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# Simplify: Residential Cost Simplification

Description	Quantity	Cost
...	...	...

Description	Quantity	Cost
...	...	...

Sequence Steps = 19  
(was 75)

Description	Quantity	Cost
...	...	...

Description	Quantity	Cost
...	...	...

Description	Quantity	Cost
...	...	...

Description	Quantity	Cost
...	...	...

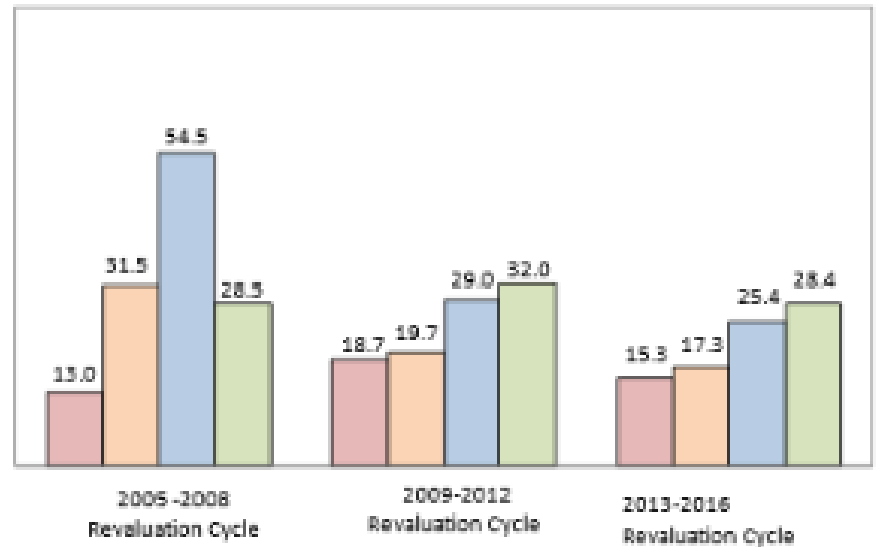
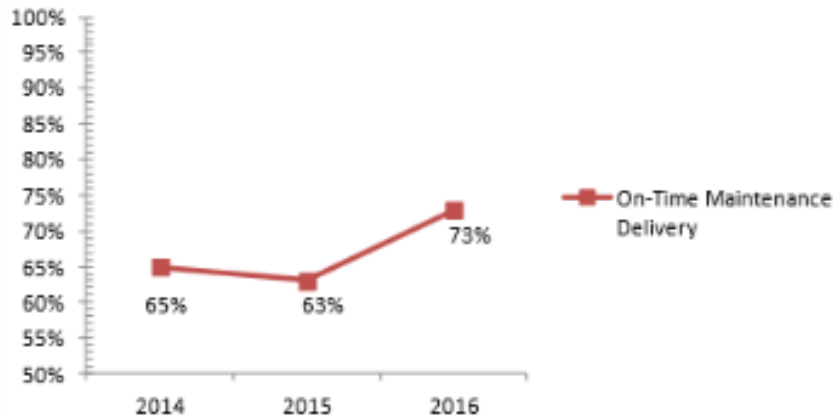
Sequence Step Options = 83  
(was 336)

Description	Quantity	Cost
...	...	...

# Streamline: Improved Business Processes

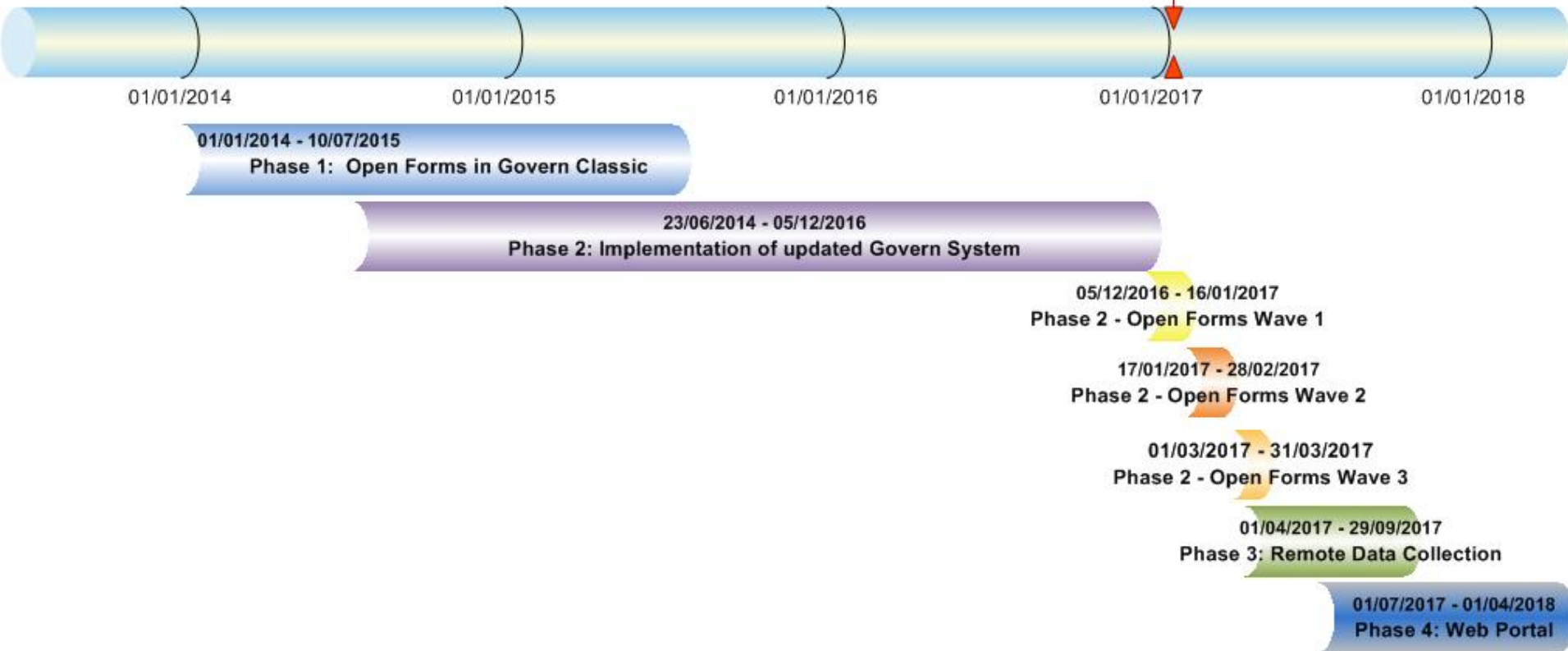
Revaluation Appraiser Effort  
Number of Appraisers (FTEs)

On-Time Maintenance Delivery



# Technology Infrastructure Program

January 2017  
Current Position in the Program



# Technology Infrastructure Program

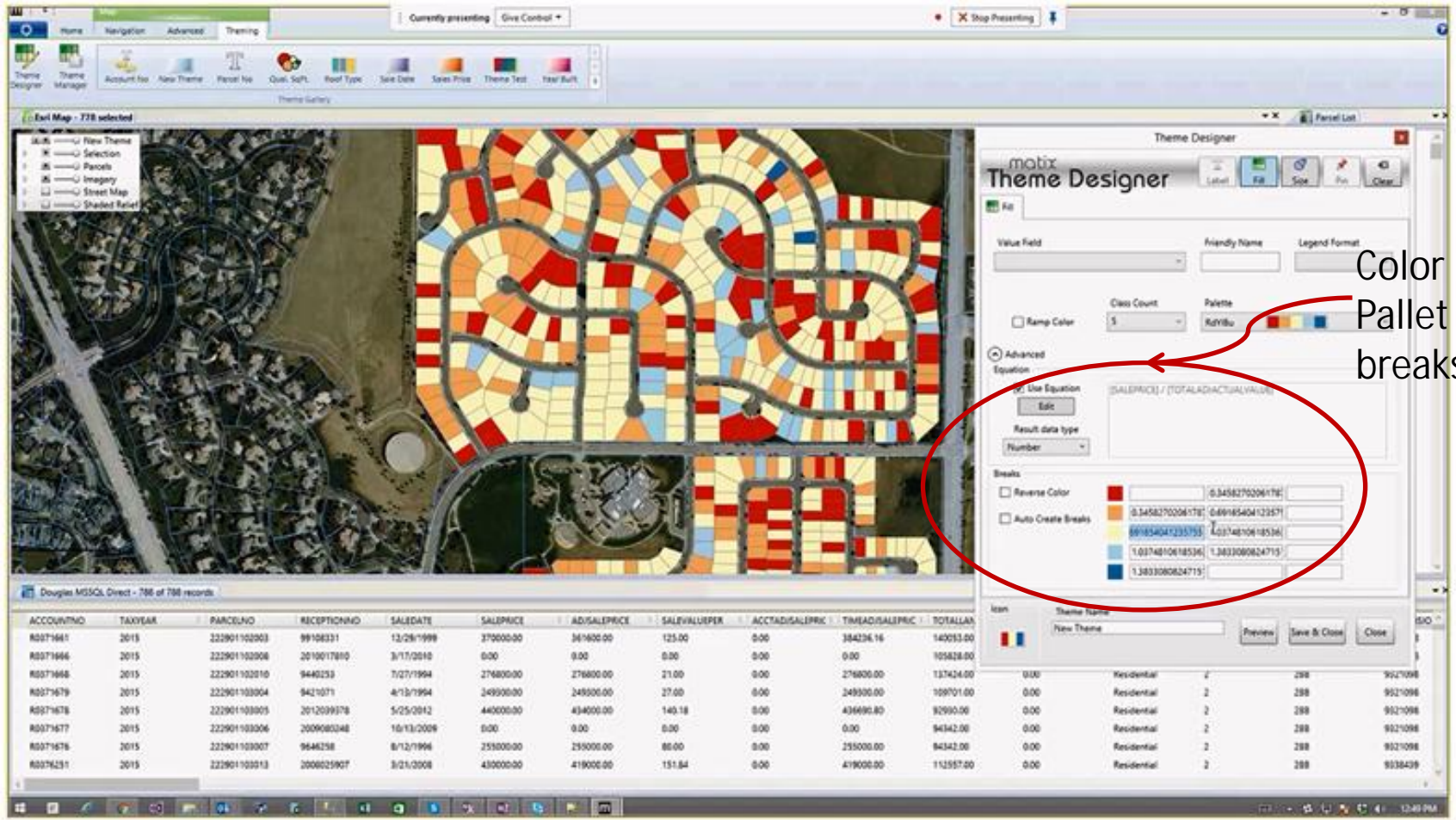
Remote Data Collection (RDC)  
April 2017 to November 2017

RDC system will support wireless connections and check-out/check-in of data where there is no wireless coverage.



# New Integrated GIS (MATIX)

SAMA staff can display any data from our Govern system and build their own themes (can select color pallet, add labels to themes, etc.)



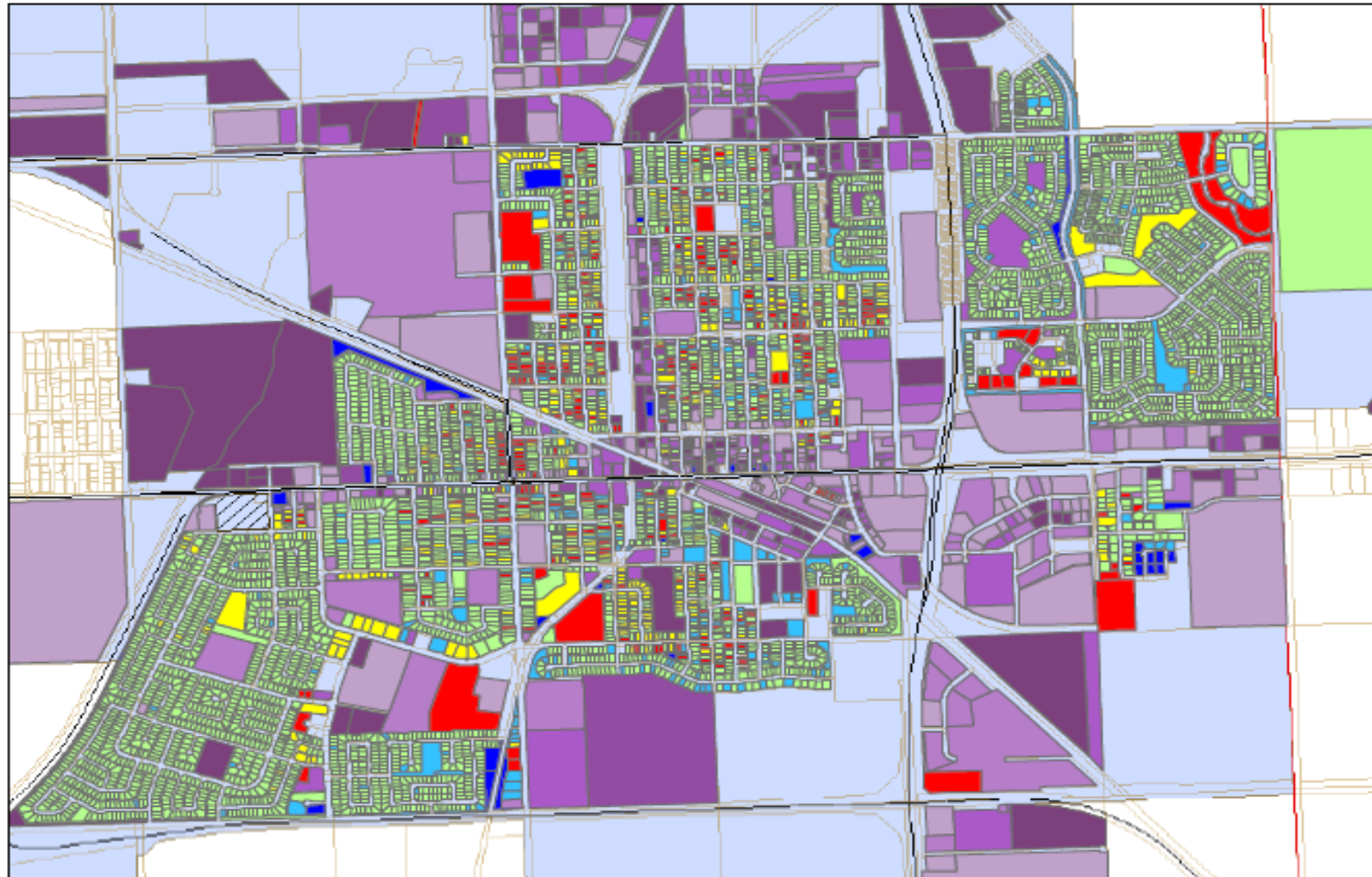
Color Pallet & 5 breaks

ACCOUNTNO	TAXYEAR	PARCELNO	RECEPTIONNO	SALEDATE	SALEPRICE	ADVSALEPRICE	SALEVALUEPER	ACCTADISALEPRIC	TIMEADISALEPRIC	TOTALLAN				
R0071681	2015	222901102003	99108331	12/28/1999	370000.00	361600.00	125.00	0.00	384236.16	142053.00				
R0071684	2015	222901102008	2010017810	3/17/2010	0.00	0.00	0.00	0.00	0.00	105828.00				
R0071686	2015	222901102010	9440233	7/27/1994	276800.00	276800.00	21.00	0.00	276800.00	137424.00				
R0071679	2015	222901103004	9421071	4/13/1994	249300.00	249300.00	27.00	0.00	249300.00	109701.00				
R0071678	2015	222901103005	201209378	5/25/2012	440000.00	434000.00	140.18	0.00	436690.80	92950.00	0.00	Residential	2	288
R0071677	2015	222901103006	2009080348	10/13/2009	0.00	0.00	0.00	0.00	0.00	94342.00	0.00	Residential	2	288
R0071676	2015	222901103007	9646238	8/12/1996	253000.00	253000.00	86.00	0.00	253000.00	84342.00	0.00	Residential	2	288
R0076231	2015	222901103013	2008025907	3/21/2008	430000.00	419000.00	151.84	0.00	419000.00	112557.00	0.00	Residential	2	288

# Enhancing Our GIS Capabilities

Appraised Value Shifts for Residential and Commercial  
in [redacted] based on the 2016 Value & the 2017 Value.

Residential Median 1.25  
Commercial Median 1.70



## Legend

### ASSESSMENT YOR\_RES\_APPRAISED

- < -30
- 30 to -10
- 10 to 10
- 10 to 30
- > 30

### ASSESSMENT YOR\_COM\_APPRAISED

- < -30
- 30 to -10
- 10 to 10
- 10 to 30
- > 30



# Web Portal Enhancements

Make forms available as an online service:

- Ø Sale Verification
- Ø Maintenance Lists
- Ø Renditions oil and gas companies
- Pre-populate forms with relevant information.
- Forms integrated with CAMA to provide efficiency when validated.

- Allow 3<sup>rd</sup> parties to transmit information to SAMA. e.g.. ISC
- Automate processing of some financial transactions.
- Enable access upon availability.

Make reports available as an online service:

- Ø Property Profiles
- Ø Inspection Reports
- Ø Summary of Assessment
- Ø Change of Ownership
- Ø Maintenance Workflow Status Report

## Customer Service & Communication

- Intuitive and user-friendly online access for all SAMA customers.
- Online communication with clients.
- Updates on current and relevant topics.
- Self service provision for forms, documents, and information.

# Issues and Risks

- Public acceptance of new 2017 values
  - New residential % require extra communications
- Volume of appeals and impact of appeal losses
  - Excessive appeal volumes will impact all other objectives
  - SAMA taken multiple steps to improve our appeal support processes
  - Capacity of appeal tribunals is an issue
- Successful implementation of new technologies on time and on budget

# Measures of Success for 2017

- 2017 Revaluation: final values successfully delivered starting February 1, 2017, with open houses, council and ratepayer meetings and appeals all handled respectfully, professionally and in a timely manner.
- QAD completed confirmations within Board established completion targets.
- New client municipalities successfully integrated + additional staff hired.

# Measures of Success for 2017

- Property reviews/inspections counts and assessment totals:
  - 60,000+/- (including industrial)
  - Substantial gains in inspection completes per day
- SAMA's 2018 to 2021 Business and Financial Plan supported by funding stakeholders including continued operational support for technology.
- **Technical Standards and Policy research work for 2021 policies well underway for completion in 2018.**

# Measures of Success for 2017

- TI Program:
  - Successful completion of waves 1-3 of Govern dot.net by May 1<sup>st</sup>.
  - New Matix GIS in production (June 2017)
  - RDC applications developed, tested and implemented by November.
  - Web Portal initial development commenced for Q1 2018 completion
- **Successful, timely staff training for Support of Value, Matix, RDC's and Govern updates.**

# Measures of Success for 2017

- Municipal clients satisfied with the service provided by SAMA staff in 2017.
- Positive relations established/maintained with GR Minister, DM, plus SUMA and SARM.
- New Board Chair and SAMA Board confident about SAMA's direction and future.
- Staff remain positive about the future with engagement rising.



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# CEO Update

## Questions?

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