

Alberta Assessors' Association

Register for IAAO Course 102 Income Approach to Valuation

The Income Approach to Valuation is designed to provide the students with an understanding and working knowledge of the procedures and techniques required to estimate the market value of vacant or improved properties by the income approach. The material covers real estate finance and investment, capitalization methods and techniques, analysis of income and expenses to estimate operating income, selection of capitalization rates, and application of the approach. The Income Approach to Valuation utilizes lectures, classroom discussion, and homework problems to emphasize the main concepts and procedures taught in the course.

Dates: March 12-16 Location: AAA Boardroom, 10555 172 St, NW, Edmonton

Cost: \$1250 (Minimum - 8), includes instruction material, lunch and refreshments each day. The textbook *Property Assessment Valuation* (3rd edition, 2010) is not included, but may be purchased directly from IAAO or through the AAA.

The Association reserves the right to cancel any course if the minimum registration is not met. Contact membership@assessor.ab.ca to register or download the .pdf form on Home page of the website.

E-Clipboard
Issue 213 2018
Winter Edition

*To be leaders
and experts in
property
assessment
in Canada.*

CONTACT US

10555-172 St
Edmonton, AB
T5S 1P1

Phone: 780.483.4222

Fax: 780.487.7505

info@assessor.ab.ca

Conference 2018: Implement - Innovate - Improve

*Join us in Calgary, April 25-27 for the
Annual Conference and General
Meeting*

Pre-Conference Education Plan on page 3.

Annual General Meeting Notice on page 5

2017-18 COMMITTEE CHAIRS

Executive Committee: Stephen Bannerman, AMAA, President

Nominating Committee: John Lindsay, AMAA

Registration Committee: Nathalie Thibeault, AMAA

Practice Review Committee: Maureen Cleary, AMAA

Examination Sub-Committee: Luis Delgado, AMAA

Legislative Policy Committee: Angel Svennes, AMAA

MC&PR Committee: TBD, AMAA

Discipline Committee: Rob Ballhorn, AMAA

2018 Conference Committee: Ashley Dao, AMAA and Les Chute, AMAA

MC&PR COMMITTEE

Sahar Gasman, Vasily Kim, AMAA; Michael Krieger; Mike Minard, AMAA; Amy Murphy, AMAA; Darren Davies, AMAA; Melissa Zayac-Smith, AMAA; Denise Ziegler-Handel, AMAA; Larry Laverty, AMAA

2018 Conference Itinerary

Alberta Municipal Affairs Reports

Guide for Info Exchange – Final

Guide to Property Assessment and Taxation

Guide for Filing a Complaint

- [Guide to Property Assessment and Taxation in Alberta](#) Updated January 2018
- [Filing a Property Assessment Complaint and preparing for your hearing](#) Updated January 2018
- [Guide for the exchange of Assessment Information: Market Value Properties](#) Updated January 2018

http://www.municipalaffairs.alberta.ca/mc_property_assessment_and_taxation_publications

AAA Professional Development

On page 7, there is a brief description in “Items of Note” on how the Pre-Conference and Conference professional development (courses and break-out sessions) are planned or chosen. The value, relevance and intensity of the offerings are due to members’ involvement - both in attending events and by communicating ideas and skills. PRC and the Association relies on the input of members for suggestions that can then be incorporated into the planning process. It should be noted that peer trainers receive double the learning credits for the course(s) they deliver.

Wednesday April 25

7:30 a.m.	-	4:30 p.m.	Registration
7:30 a.m.	-	8:45 a.m.	Breakfast (Buffet Service)
9:00 a.m.	-	4:30 p.m.	Silent Auction Open
9:00 a.m.	-	10:00 a.m.	Urban and Rural Breakout Meetings
10:15 a.m.	-	12:00 p.m.	Legal Issues
12:00 p.m.	-	1:00 p.m.	Lunch
1:30 p.m.	-	3:30 p.m.	President’s Forum
3:15 p.m.	-	4:15 p.m.	Battle of Assessors Hockey Game at Don Hartman NE Sportplex (5206 68 St NE)
4:00 p.m.	-	6:00 p.m.	Hospitality Reception Sponsored by Reynolds Mirth Richards & Farmer LLP
6:00 p.m.	-	8:30 p.m.	President’s Dinner (by invitation only)
6:00 p.m.	-	9:00 p.m.	CPTA Banquet (members’ and guests only)
8:00 p.m.	-	12:00 a.m.	Icebreaker – The Rec Room

Thursday April 26

7:30 a.m.	-	2:00 p.m.	Registration
7:30 a.m.	-	4:00 p.m.	Silent Auction Open
7:30 a.m.	-	8:30 a.m.	Breakfast (Buffet Service)
8:30 a.m.	-	9:00 a.m.	Opening Ceremonies and Greetings
9:00 a.m.	-	10:15 a.m.	Keynote – Richard Bartrem, VP Marketing, WestJet
10:30 a.m.	-	12:00 p.m.	Presentations State of the Economy – Alberta’s Chief Economist Jurisdictional Outlook – Provinces, IAAO
12:00 p.m.	-	1:00 p.m.	Lunch
1:30 p.m.	-	3:30 p.m.	Alberta Assessors’ Association Annual Meeting
4:00 p.m.	-	5:30 p.m.	Hospitality Reception Sponsored by Brownlee LLP
6:00 p.m.	-	10:00 p.m.	Assessors’ Banquet – Duelling Pianos

Friday April 27

7:30 a.m.	-	9:00 a.m.	Registration
7:30 a.m.	-	8:30 a.m.	Breakfast (Buffet Service)
9:00 a.m.	-	10:00 a.m.	Concurrent Workshops
10:15 a.m.	-	11:15 p.m.	Concurrent Workshops (repeated)
11:30 a.m.	-	12:30 p.m.	Concurrent Workshops (repeated)

2018 Pre-Conference Education Program

STAKEHOLDER ADVISORY COMMITTEE

Mission Statement

The processes used to prepare assessment and property tax notices in Alberta are important to all property owners. Therefore, a committee of knowledgeable individuals is necessary to ensure that Alberta is a leader in the administration of assessment and property tax. These knowledgeable individuals will provide advice and guidance on “best practices”, work towards resolving issues, and continuously improving the assessment and property tax system in Alberta.

Purpose

To provide a forum for:

- o Developing ideas and options for resolving technical issues
- o Strategic dialogue and two-way communication on issues
- o Opportunity for stakeholders to provide input on assessment policy and the administration of property taxes.

NEXT MEETING OF SAC

SAC has not met and there are no meetings scheduled.

Monday April 23

8:30 a.m. to 4:00 p.m. - Pre-Conference Education Courses

2018PC-01 A Year in Municipal Property Tax Administration
10 Learning Credits

Instructors: Lavinia Henderson and Guests

2018PC-02 Professionalism and Ethics
10 Learning Credits

Instructor: Colleen Symyrozum-Watt, M.Ed., College of Alberta School Superintendents

2018PC-03 Worksafe III
6 Learning Credits

Instructor: Kerry Sauve

2018PC-04 Advanced Excel for Assesors
6 Learning Credits

Instructor: Mike Arnold, AMAA

2018PC-07 Legislation and Regulation – Interpretation and Implementation
6 Learning Credits

Instructors: Carol Zukiwski and Guests

Tuesday April 24

8:30 a.m. to 4:00 p.m. - Pre-Conference Education Courses

2018PC-01 A Year in Municipal Property Tax Administration (Day 2)

2018PC-02 Professionalism and Ethics (Day 2)

2018PC05 Retirement Planning or Life-Planning for Retirement
6 Learning Credits

Instructors: Patricia French
Doris Bonora
Phil Mak

PC2018-06 Intermediate/Advanced Ad Hoc Query
6 Learning Credits

Instructor: Brad Hurt, AMAA

PC2018-08 Section 295(4) Applications for Dismissal
3 Learning Credits

Instructor: Daniel Lidgren, AMAA

Conference Overview and Break-out Sessions

CONFERENCE PLANNING TEAM

Many thanks to our Conference Planning Team:

Co-Chairs Ashley Dao and Les Chute;

Carol Megaw;

Mitch Walz;

Gianna Fuller;

Robyn Ferguson,

Vanessa Powell;

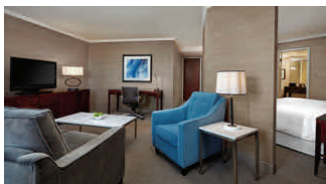
Maureen Cleary (PRC) and

Todd Brasseur, Financial Director (ex officio)

This is not an easy task and once all the “big” decisions are made, the thousand little details are dealt with. The work of everyone involved is invaluable and words are not always enough as thanks!

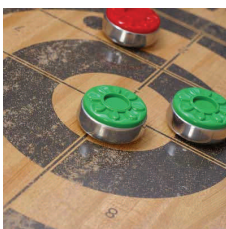
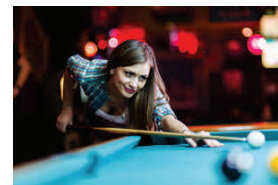
The itinerary on page 2 shows the schedule for all three days of conference. If you’re “on the fence” about attending, consider this....

Conference is at the Calgary Sheraton Cavalier, conveniently located near the airport. Your booking could place you in one of their luxurious guestrooms



(probably not this one). Registration will give you access to the annual Icebreaker at The Rec Room where, among other things, you can play pool (probably not with her).

Or you can challenge a colleague to some shuffleboard.



Of course, this all happens after you take care of the business of the day: Rural and Urban Meetings and Legal Panel in the morning of Wednesday, April 25 and the President’s Forum with Municipal Affairs ADM, Ms. Stephanie Clarke in the afternoon.

Some of you may cut out a little early to test yourself in a ferocious but fun hockey game (probably these guys and gals). On Thursday, you could hear from WestJet’s Richard Bartrem, who is responsible for WestJet’s April Fools day humour and, according to



(This guy)

a member who’s heard him speak, can talk about change and corporate culture with humour and wit!

After the keynote, delegates will hear from Catharine Rothrock, Alberta’s Chief Economist on the “state of the economy” and what goes into economic



(This is she)

forecasts. Then everyone can hear from our sister-organizations and their assessment experiences. ALL before lunch!

The Banquet menu is a surprise, but the entertainment will feature the keyboard mastery of The Duelling Piano Kings who claim, as a goal, that “every single person will leave with a smile on their face.”



Which is good, because Friday is all about the breakouts:



(Not this kind!)

- The “New” Stress – motivator or morale breaker?
- Presentation Skills
- Assessment 101
- Guide for the Exchange of Information
- Solar Technologies

Are you convinced? You need to register!

Notice of Annual General Meeting

Alberta Assessors' Association

OUR VISION – What we aspire to

To be recognized as leaders and experts in Property Assessment in Canada.

OUR MISSION – Our reason for being

The Alberta Assessors Association provides expertise and leadership for our members and the public through education, advocacy and ethical standards of practice to ensure fairness, equity and transparency in Property Assessment.

OUR STRATEGIC OBJECTIVES – Our strategic areas of focus for the next three years:

Advance High Quality Educational Opportunities for our members and the public.

Grow Our Membership within the industry and municipalities to enhance our influence and recognition with government and advocacy groups.

Strengthen Our External Relationships and Develop Collaborative Partnerships to ensure that we are acknowledged as experts and relied upon for our input on policy, legislation and implementation.

Advocate on behalf of the membership to facilitate understanding of our profession and how we use our expertise to advance the field of property assessment.

The Association Bylaws state:

A written notice stating the day, hour and place of an Annual General Meeting or Special Meeting, shall be served either personally or by sending such notice to each regulated member at the last address of that member known to the Association Registrar through the post, by facsimile or by email, at least ten days before the date of a meeting.

Additional written notice and direction to receive your packages will follow for the planned **April 26, 2018 Annual General Meeting** at the Calgary Sheraton Cavalier beginning at 1:30 p.m. If you have not already done so, please update your contact information. As most of our messages are sent via email, **a current email address is critical** for communications.

We hired!

After a long search process and some false starts, on November 1, the Member Services position was filled by **Craig Stansfield**.



Craig is a long-time administrative professional, including more than 26 years of experience that began with a Chartered Accountant in 1991. Craig has worked in various organizations including the Government of Alberta, the U of A Hospital, WCB and NorQuest College. Most recently, he worked as a Data Quality Specialist for the Better Business Bureau. Part of his duties included managing files on consumer complaints. Craig is married with three grown children and three (almost 4) grandchildren. While he has been a longtime resident of Edmonton (1981), Craig actually lived all over Canada and 5 years in Bermuda (including his Kindergarten year) as the child of a military family. Craig is a true foodie and even has a Certificate in Baking from NAIT. His favourite memory: “My grandmother’s bakery and the smell of fresh baked bread and pies.”

Craig is looking forward to the Conference experience and meeting many of the members whose names he runs across frequently. I know our members will welcome his calm, capable demeanor and his desire to learn as much as he can about the Association and the industry.

MEMBERSHIP CATEGORIES

An **Accredited Municipal Assessor of Alberta** is any person who is a practicing assessor, has been a Candidate Member for at least one year, and has met all of the requirements of and holds the AMAA designation in good standing.

A **Candidate Member** is the entry-level membership category for those wishing to pursue the AMAA designation or for those who are preparing assessments under the supervision of an Accredited Member.

An **Associate Member** is any person who has demonstrated an interest in the practice of assessment as determined by the Registration Committee and has been sponsored by an Accredited Member.

A qualifying **Student Member** must be a person enrolled full time in secondary or post-secondary educational studies and cannot be employed full time in the assessment or appraisal industry.

A **Municipal Property Tax Administrator** provides professional services in property tax administration or property tax policy or related functions.

Welcome New Members

Having submitted an application for membership as required by policy, including obtaining the support of an accredited member, the following individuals have been accepted as regulated Candidate members:

New Candidates

- ⇒ Shane Crooks, St. Albert
- ⇒ Erica Popovics, City of Calgary
- ⇒ Nathan Hanberry, Town of Okotoks
- ⇒ Sheldon Farrell, Mountain View County
- ⇒ Nicole LaFrance, City of Edmonton
- ⇒ Andrew Zhao, City of Edmonton
- ⇒ Nadezda Gordeeva, City of Edmonton
- ⇒ Nicole Oltmanns, Saddle Hills County
- ⇒ Ally Dittrick, Accurate Assessment Group
- ⇒ Hyunki Jung, City of Edmonton

Having obtained sponsorship of an accredited member and submitted an application meeting the following individuals have been accepted as unregulated members:

Municipal Property Tax Administrator

- ⇒ Kyle Sattler, City of Lloydminster
- ⇒ Lexie Robinson, County of Wetaskiwin

Student Member

- ⇒ Marina Gardner, Lakeland College
- ⇒ Janine Pecoro, University of Saskatchewan

Welcome Newly Accredited Members

Having met all the requirements for accreditation, the following members have been granted the Accredited Municipal Assessors of Alberta (AMAA) designation with all its rights and obligations:

- ⇒ Heidi Leduc, City of Calgary;
- ⇒ Adam Martin, Benchmark Assessment
- ⇒ David Glen Clark, City of Red Deer
- ⇒ Kristin Coutts, Sturgeon County

TOP 10 REASONS TO VOLUNTEER

10. It's good for you
9. It saves money
8. Volunteers gain professional services
7. It brings people together
6. It promotes personal growth and self-efficacy
5. It strengthens the organization (or community)
4. It's a learning experience
3. It's a chance to give back
2. It encourages civic responsibility
1. You makes a difference

Items of Note to Members

- * **Membership Renewals:** The Membership year begins March 1. Renewal notices are sent that day. We rely on members to **update contact emails** and employer information in order that you receive your renewal notices and in order for Administration to correctly invoice your employer(s).
- * **Committee Volunteers:** At this time of year, volunteers are asked about their plans to remain on committees so that the President and President-Elect can plan for vacancies and put a call-out to members for their interest in serving on a committee. In anticipation of this, call the Association office and let us know what committee you might like to serve.
- * **Strategic Planning:** The Executive Committee is reviewing its strategic plan for business initiatives for the coming year and into the future. President Bannerman will be reporting at the AGM on the activities of the past year, including those “strategic” initiatives that are considered complete, those that are continuing and those that are changing and moving forward. The Conference Theme “Implement, Innovate, Improve” will continue through the year as members work through the myriad changes in the assessment process and, for the Association, as the leadership changes and business plan initiatives are implemented.
- * **Budgeting:** The Executive periodically reviews different expense items in its governing fiduciary role. Recently, an analysis of conference activities (cost centres) was reviewed using seven years of data. One question that arose was the budget for the delegate gifts. As part of the post-event evaluation, delegates will be asked whether the delegate gifts (eg bags, mugs, etc.) should be discontinued and the funds applied elsewhere.
- * **Communications and Promotions:** The eClipboard as a communication tool will be reviewed in 2018 with the MCPR Committee. Members will be asked to weigh in on this and other communication efforts.
- * **Fall Symposium** The City and County of Grande Prairie have partnered to host the 2018 Fall Education Symposium. Information will be available to members at the start of the summer.
- * **AAA Professional Development (Education):** The Practice Review Committee is tasked with developing the education plans for each year for Conference, Pre-Conference and Symposium. PRC uses five themes to guide its planning: **Valuation, Technology, Tribunal/Legal, Personal/Professional Development, and Safety**. Each year in September or October, there is a “call out” for proposals for peer training, but ideas and proposals can be submitted at any time. “Proposals” can be in the form of full course outlines and deliverables; descriptions; or, a subject matter (topic idea) that can be more fully developed by possible (suggested) subject matter experts. Education planning is a monumental task; all members can support PRC and its planning by continually submitting ideas, proposals and by volunteering as peer trainers to ensure the courses and sessions offered at events are valuable and relevant.