

UNITED FOR GROWTH

Alberta Assessors' Association Pre-Conference Education Program

April 8-9, 2019

River Cree Resort – Enoch, Alberta



2019 Pre-Conference Education

Continuing the Alberta Assessors' Association tradition of offering professional development opportunities in the manner of pre-conference full and part day sessions

Sessional pricing does NOT include lunch on Monday and Tuesday

Member/Non-member pricing applies

Coffee service is provided each day.

Monday April 8

7:30 a.m. to 9:00 a.m. - Registration Desk Open for Questions*

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

Tuesday April 9

7:30 a.m. to 9:00 a.m. - Registration Open for Questions*

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

4:00 p.m. – 7:00 p.m.
Early Registration for Conference

Compass Municipal Services User Group Meeting
7:30 p.m. -8:30 p.m.

Compass Municipal Services Customer Reception
8:30 p.m. – 11:00 p.m.

*Classes begin at 9:00 a.m. **sharp.**
Doors open at 8:30. Please time your arrival accordingly.



2019 Pre-Conference Courses Monday April 8, 2019

Commercial Cost Approach Certification (2019PC01)

This is Day 1 of a two-day workshop.

The Commercial Cost Approach Certification Course will help you achieve greater accuracy by learning the data-driven method, which is a complement to sales-comparison valuations, direct from the source. Corelogic experts in building valuation will expand your knowledge of the cost approach and train you to apply the construction cost approach to determine the replacement costs of commercial buildings and improvements in the U.S. and Canada, using the flagship Marshall & Swift Valuation Service.

Course Learning Objectives

- Concepts and specific steps used in the cost approach
- Construction class
- Quality
- Occupancy Groups
- Refinements & Adjustments
- Interpolation & Modifications
- Exercises for Replacement Cost New
- Depreciation
- Segregated Cost Method

Instructor(s): Steven Smith, Corelogic
Time: 8:30 am to 4:00 pm
Location: TBD
Min/Max Participants: 12/20
Re-certification Credits: 10 Learning-based for AMAA members
Cost: \$1000 Member/\$1200 Non-member (+ GST) for Day 1 + Day 2

Professionalism and Ethics (2019PC02)

This may run into Day 2.

The Alberta Assessors' Association adopted the current Code of Conduct and Ethics as part of its pursuit of self-regulation and membership in POARA. In 2015, following considerable discussion and study of the professional standards of various organizations, the Association "borrowed" Ontario's Institute of Municipal Assessors Code of Code of Ethics and Professional Standards, rephrased portions to align with Alberta's legislative requirements and adopted the AAA Code of Conduct and Ethics and Professional Standards.

This course is the second and final "beta" test of the Association's Professionalism and Ethics course based on the 2015-approved Code of Conduct and Ethics and Professional Standards. This year's offering has been offered to the Association's statutory and discretionary committee members, firstly, and registration is now open to the general membership on a limited first-come, first-served basis. The material will consider how the AAA Code of Conduct and Ethics and Professional Standards applies in the work environment and in external but related situations. Organizational culture and personal values are also considered in the context of professional ethical behaviour. The AAA acknowledges the Institute of Municipal Assessors (Ontario) for its course and the conditions for its use by the AAA.



Instructor(s): Jeff McKinnon, AMAA
Time: 8:30 am to 4:00 pm
Location: TBD
Min/Max Participants: 10/30
Re-certification Credits: 6 Learning-based
Cost: \$250 Members Only (+ GST)

Project Management Fundamentals (2019PC03)

Participants will develop their understanding of projects and their relationship to an organization's strategic and business plans, as well as increase their understanding and ability in applying project management tools.

Course Learning Objectives:

- Describe the project management context within a public sector environment and a review of the generic life cycle of a project from Initiation, Managing a Project and Finalization.
- Identify prerequisite business practices needed before entering into project management.
- Describe basic principles and tools for project management.

Instructor(s) City of Edmonton School of Business.
Time: 8:30 am to 4:00 pm
Location TBD
Min/Max Participants: 15/25
Re-certification Credits: 6 Learning-based
Member Cost: \$550 Members /\$600 Non-Members (+GST)

PAAH Office Buildings (2019PC04)

Review the fundamentals of valuing office buildings and revisit the office module of the Practicing Assessment in Alberta Handbook as an aid in the valuation process.

Instructor(s): Devon Chew, AMAA and Tyler Johnson, BMgt.
Time: 8:30 am to 4:00 pm
Location: Schoolroom
Min/Max Participants: 10/50
Re-certification Credits: 6 Learning-based
Cost: \$250 Member/\$300 Non-member (+ GST)

ARB for Non-Assessors (2019PC07)

This half-day session is intended for municipal staff with little or no tribunal exposure and who have taken or are planning on taking the full training courses scheduled by Municipal Affairs. Delegates will be exposed to applied and practical experience of ARB staff before, during and after hearings and be provided with an overview of the training and theoretical procedures that are more fully explored in the formal training sessions for ARB Clerks.

Instructor(s): Jackie Kurylo, CTAJ and Donna M. Graham, Municipal Affairs
Time: 8:30 am to 12:00 pm
Location: Schoolroom
Min/Max Participants: 10/40
Re-certification Credits: 6 Learning-based
Cost: \$250 Member/\$300 Non-member (+ GST)



2019 Pre-Conference Courses
Tuesday April 9, 2019

Commercial Cost Approach Certification (2019PC01)

This is Day 2 of a two-day workshop.

Professionalism and Ethics (2019PC02)

This is Day 2 of a two-day course.

Change Management Fundamentals (2019PC06)

Participants will develop their ability to identify how changes impact business units and learn about supporting successful transitions through the change process from an advisory perspective. Topics covered include: Change as a process; change concepts; skills and practical tools for supporting others through change.

Course Learning Objectives:

- Describe what enables successful change.
- Develop a plan for how to address [individual] concerns about change.
- Explain how people typically feel when experiencing change.

Instructor(s): City of Edmonton School of Business
Time: 8:30 am to 12:00 pm
Location: Schoolroom
Min/Max Participants: 15/25
Re-certification Credits: 3 Learning-based
Cost: \$350 Member/\$400 Non-member (+ GST)

Section 295(4) Applications for Dismissal (2019PC08)

This session will review the legislation, taking note of recent changes that have come into force with the *Modernized Municipal Government Act* in the event Complainants do not comply with information requests. Participants will learn how to deal with legal arguments from an Assessor's perspective and learn about relevant case law. In addition, in support of developing in-house "best practices," Calgary's processes will be discussed as they relate to

- the review process
- communication with customers
- board presentation strategy
- evidence preparation
- examples of evidence packages
- overall success statistics and metrics
- board decisions

with the intent that participants will gain some insights and leave with information that can be developed and modified for use in their own municipalities,

Instructor(s): Daniel Lidgren, AMAA
Time: 8:30 am to 12:00 pm
Location: Schoolroom



Min/Max Participants: 10/25
Re-certification Credits: 3 Learning-based
Cost: \$250 Member/\$300 Non-member (+ GST)

Meeting Facilitation (2019PC05)

With the amount of time everyone invests in running, attending and following up on group work sessions, learning to be an effective facilitator is of critical importance. This workshop will provide valuable information and tools for work session facilitators and participants alike. It will enable participants to make more effective use of the time they invest in work sessions and help them to become a more effective facilitator and contributing participant.

Course Learning Objectives:

- Plan and prepare for effective work sessions.
- Use tools for effective structuring of their work sessions process.
- Identify, avoid and mitigate common work session facilitation pitfalls.
- Facilitate work sessions to achieve results.
- Actively engage participants and enable them to contribute effectively.

Instructor(s): City of Edmonton School of Business
Time: 1:00 pm to 4:00 p.m.
Location: Schoolroom
Min/Max Participants: 15/25
Re-certification Credits: 3 Learning-based
Cost: \$350 Member/\$400 Non-member (+ GST)

Assessing Non-DIP Machinery and Equipment (2019PC09)

Participants will review current legislation and apply it to several case studies to identify municipal (non-DIP) improvements and determine whether they are buildings and structures or machinery and equipment. Case studies may consider further what, if any, impact agricultural operations have on the assessability of the improvements. What criteria are required to make these determinations and what are the demarcation points between the improvement types.

Instructor(s): Carol Zukiwski and Angel Svenes, AMAA
Time: 1:00 pm to 4:00 p.m.
Location: Schoolroom
Min/Max Participants: 10/40
Re-certification Credits: 3 Learning-based
Cost: \$250 Member/\$300 Non-member (+ GST)

Pre-Conference Course Instructors

Steven Smith started working at Corelogic in 2015 at the Technical Support Desk. In 2017 Steven took over the Internal Training for the Residential and Commercial handbooks and tools. He supported online and software solutions and was the product expert at the desk. Today, Steven is a client training professional who schedules, coordinates and conducts training onsite, as well as online. Steven has conducted training for the Technical Support Desk, Inside Sales, and Client Services in addition to training clients in the use of various CoreLogic products



Jeff McKinnon, AMAA is the Assessment Manager (Non-Residential) with Strathcona County, a position he has held since 2013. Jeff received his accreditation in 2005 and has been an active volunteer with the Association since his membership date. In his role as Chair of the Practice Review Committee, Jeff was involved with the adoption of the Association's Professional Standards, the purchase and the subsequent revisions of the Professionalism and Ethics course material from the Institute of Municipal Assessors for use by the AAA

Tyler Johnson has been an assessor with the City of Calgary for over ten years. He has a Bachelor of Management from the University of Lethbridge and a Diploma of Urban Land Economics from UBC. He is a candidate member with the association and is working towards completing his final demonstration report. Over the years Tyler has worked on numerous property types such as hotels, retail, land, special purpose properties, and is currently part of the Downtown Office team. Prior to working as an assessor Tyler worked in various positions in the construction industry.

Devon Chew, AMAA has been the Team Lead for the Edmonton Office & Hotel team for the last 2 years. He holds the Accredited Municipal Assessor of Alberta designation and has over 10 years' of assessment experience in Edmonton with commercial and multi-residential properties in Edmonton.

Jackie Kurylo, CTAJ is the Appeals Coordinator for the Central Alberta Regional Assessment Review Board and has achieved the Certificate in Tribunal Administrative Justice through the Foundation of Administrative Justice.

Donna M. Graham has been an advisor with Municipal Affairs' Assessment Service Branch for 10 years. She has been engaged in the Assessment Complaints process since the last major review in 2008-2009. That review resulted in substantial changes, including mandated training for assessment review board members; Donna has been directly involved in developing and delivering the training programs for assessment review boards throughout the Province.

Daniel Lidgren, AMAA, AACI, P.App has been working in the assessment industry for 10 years and he has worked for The City of Calgary his entire career. He has valued many different types of property including single residential, multi-residential, retail and office properties. He currently leads the team of assessors responsible for valuing all of the office properties throughout Calgary. Daniel is an Accredited Municipal Assessor of Alberta and an Accredited Appraiser Canadian Institute, Professional Appraiser and he also holds a Bachelor of Arts in Economics degree from the University of Calgary. In addition to his work career, Daniel is a professional Scottish bagpiper and has competed solo and with pipe bands throughout North America and in Scotland over the past 20 years.

Angel Svennes AMAA is the Appointed Assessor for the Municipal District of Taber. She began her career in 1996 with Municipal Affairs working with Assessment Audit and Linear Assessment after graduating Lakeland College. Since that time her career path has led her to gain urban experience with primarily residential property types including mobile homes, multi-family and condominiums. Angel has also accumulated rural experience assessing commercial, industrial, machinery and equipment, and special purpose properties as well as complete revaluations of market land rates. Over the span of her career she has also promoted the profession by participating on the Alberta Assessor's Association Marketing Committee for several terms, completing an elected term as Rural Director, and more recently as President, Past President and Chair of the Nominating Committee and currently chairs the Legislative Policy Committee.



Carol Zukiwski, Barrister & Solicitor – Reynolds Mirth Richards & Farmer LLP

Carol's practice is primarily focused on assisting municipalities and the provincial assessor with property assessment complaints and appeals. Carol also serves as counsel to administrative tribunals helping them with determining a fair hearing procedure and with decision writing. She appears regularly before the Municipal Government Board, Composite Assessment Review Boards and before the Court of Queen's Bench. Carol has been on the staff of two Boards and a member of two additional Boards. Carol is a Qualified Arbitrator (Q.Arb) which is a national designation. Arbitrators are appointed to solve disputes under commercial contracts, in labour disputes, family and estate disputes. This allows Carol to use her strong skills in fair process and decision writing as an independent neutral adjudicator. Carol is also an instructor with the Foundation of Administrative Justice, which is a non-profit organization that provides board member training.

Edmonton School of Business has as its Mission: *The place for building organizational capacity through learning and development* with a corporate work plan to "leverage learning as a competitive advantage in building a strong and sustainable workforce for today and the future."



Monday April 8 At-a-Glance
8:30 a.m. to 4:00 p.m. - Pre-Conference Education Courses

2019PC01 Corelogic Commercial Cost Approach – 10 Learning Credits
Instructors: Steven M. Smith, Corelogic

2019PC02 Professionalism and Ethics – 6 Learning Credits
Instructor: Jeff McKinnon, AMAA.,

2019PC03 Project Management Fundamentals – 6 Learning Credits
Instructor: Edmonton School of Business

2019PC04 PAAH Office Module – 6 Learning Credits
Instructor: Tyler Johnson, BMgmt and Devon Chew, AMAA

2019PC07 ARB for Non-Assessors
Jackie Kurylo, CTAJ and Donna M. Graham

Tuesday April 9 At-a-Glance
8:30 a.m. to 4:00 p.m. - Pre-Conference Education Courses

2019PC01 (Day 2) Corelogic Commercial Cost Approach - 10 Learning Credits
Instructors: Steven M. Smith

2019PC02 (Day 2) Professionalism and Ethics – 6 Learning Credits
Instructor: Jeff McKinnon, AMAA

PC201906 Change Management Fundamentals (Prosci) – 3 Learning Credits
Instructor: Edmonton School of Business

2019PC05 Meeting Facilitation – 3 Learning Credits
Instructors: Edmonton School of Business

PC201908 Section 295(4) Applications for Dismissal – 3 Learning Credits
Instructor: Daniel Lidgren, AMAA

PC201909 Assessing Non-DIP Machinery and Equipment – 3 Learning Credits
Carol Zukiwski and Angel Svennes, AMAA



Registration Information

The Pre-Conference course fees cover the cost of instruction, meeting room, equipment and materials. To register for any of the Pre-Conference courses, please complete the 2019 Pre-Conference Education Program Registration Form (posted separately) and submit with payment (see payment information below).

Due to the requirement to earn learning credits, the Alberta Assessors' Association reserves the right to register accredited and regulated members on a priority basis. All other members and non-members will be registered if maximum registration limits have not been reached by March 22, 2019. Pre-Conference fees include coffee service but **DO NOT** include meals. The River Cree Resort has a number of options for meals at varying price points. Lunch is generally scheduled from 12:00 pm - 1:00 pm.

Payment Information

Please send your payment by **cheque or money order** together with your Conference and/or Pre-Conference Registration Forms to the:

Alberta Assessors' Association
10555 – 172 Street
Edmonton, AB T5S 1P1
Fax: 780-487-7505; email: membership@assessor.ab.ca

We do accept credit cards, however, the cardholder is charged service fees required by our service-provider which may include cash advance fees. A link for payments is on the Association's homepage. Arrangements can be made for payment by [interac] email transfer by advising Members Services and must include GST (GST # R122234610RT0001) in the total. Requests to be invoiced must include an authorized signature.

Cancellation Policy

The Alberta Assessors' Association reserves the right to cancel Pre-Conference Courses that have not met minimum registration requirements by March 15, 2019. Participants will be contacted if the course is cancelled. No refunds will be issued for confirmed Pre-Conference course attendance after March 22, 2019, however replacements will be accepted.

Accommodations

The River Cree Resort has a guest room block reserved for the Alberta Assessors' Association. **Callers must mention the "Alberta Assessors' Association Annual Conference"** to ensure they receive the appropriate guest room block rate. All rooms are subject to a 4% Tourism Levy and 5% GST. **All reservations for guest rooms are the responsibility of the individual and must be made by 5:00 p.m. on March 8, 2019 to take advantage of the block rate.**