

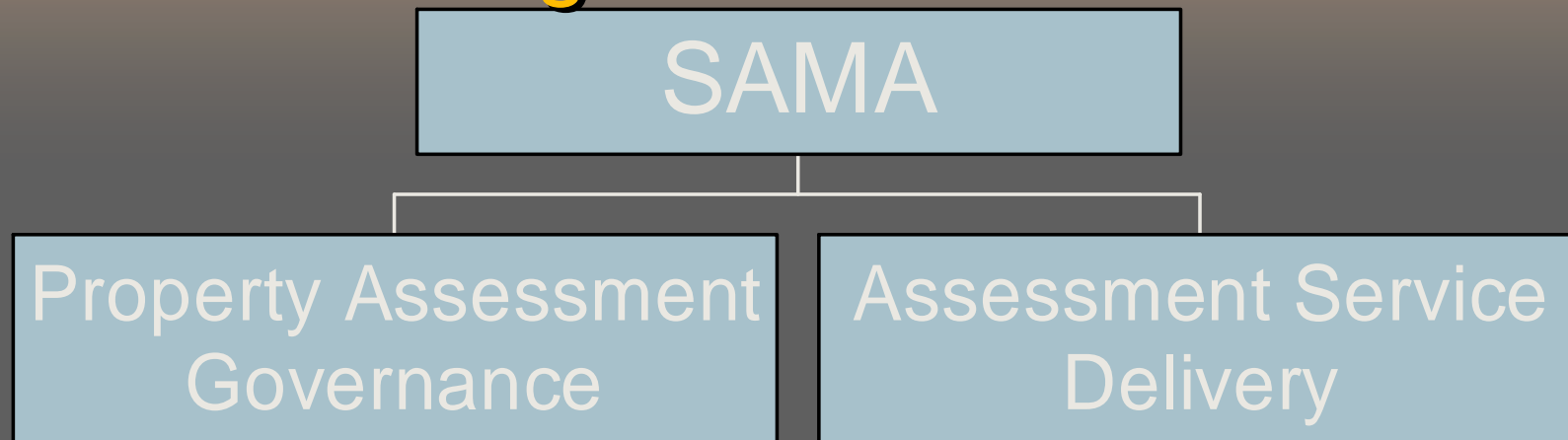
2008 SAMA Annual Meeting

Chief Executive Officer Progress Report

The Year in Review
And A Look Ahead to 2009

June 2008

Background Information



- Agency responsible for \$50+ Billion property assessment/\$1.46 Billion property tax base
 - 11 member Board of Directors
 - Over 175 staff focused on assessment governance and service delivery

REGIONS



Saskatoon and
North Battleford



Regina



Moose Jaw



Weyburn



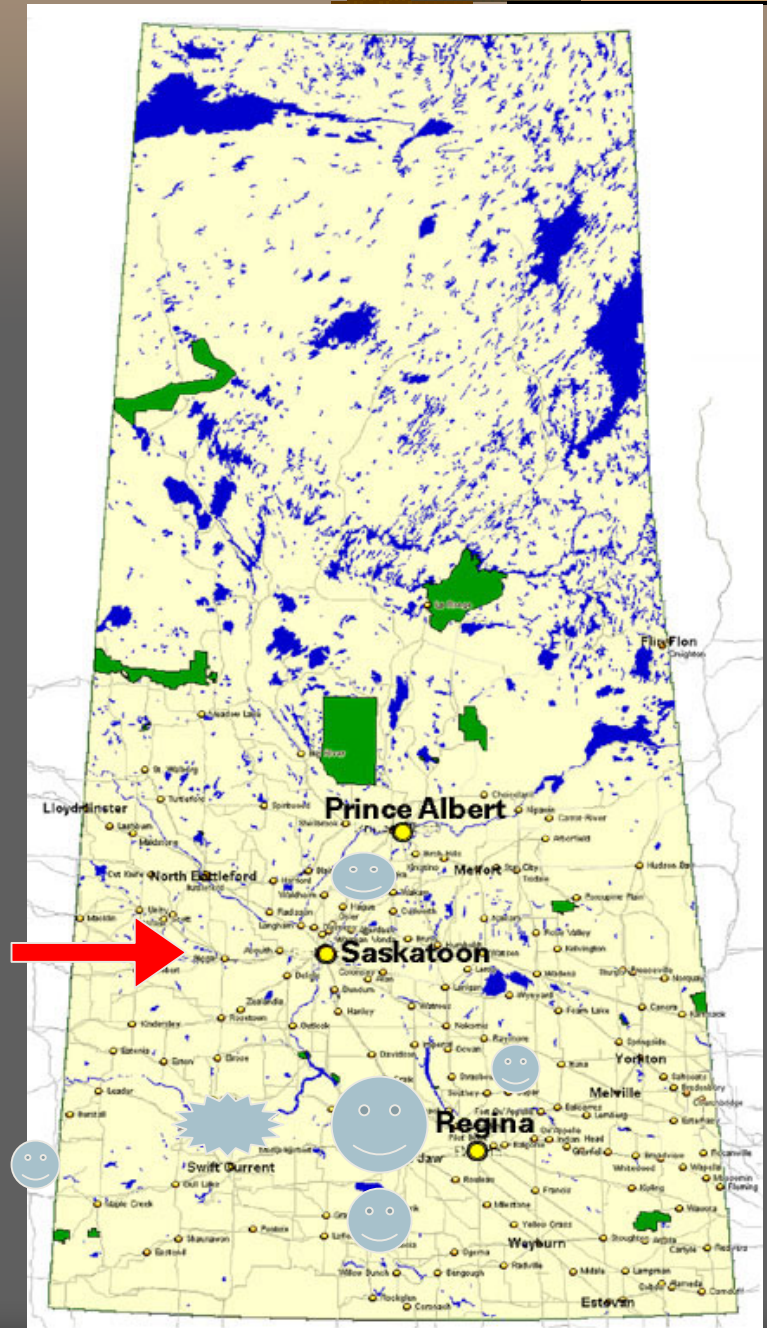
Melfort



Yorkton



Swift Current



Assessment Fundamentals

- Ad Valorem Assessment System
- Four Year Revaluation Cycle
- Base Date

Move to MVA—Vision for 2009

“To build public trust by providing fair, transparent, understandable and defensible property valuations in a results based, mass appraisal, market value assessment system, used for the distribution of taxation.

The principles for the 2009 revaluation are to implement a market value system that:

1. Permits the use of the cost, sales comparison, and income approach where appropriate in all jurisdictions;
2. Uses regulation for properties such as agricultural land, oil and gas well production equipment, linear property and heavy industrial property; and
3. Sets the stage for a shorter revaluation cycle.”

2007 – 2008 In Review

The 2009 Revaluation

High level objectives:

- ✓ Legislative changes (2006*)
- ✓ Research and Policy finalization; Manual and Handbook preparation (March 2007)
- ✓ Sales and income data collection (March 1/August 1, 2007)
- ✓ Market analysis, value reconciliation, SPAN data entry (December 10, 2007)
- ✓ Preliminary values to Municipal Affairs (December 21, 2007)
- Preliminary values to SAMA clients (June 2008)

*Northern Municipalities Act changes scheduled for fall of 2008

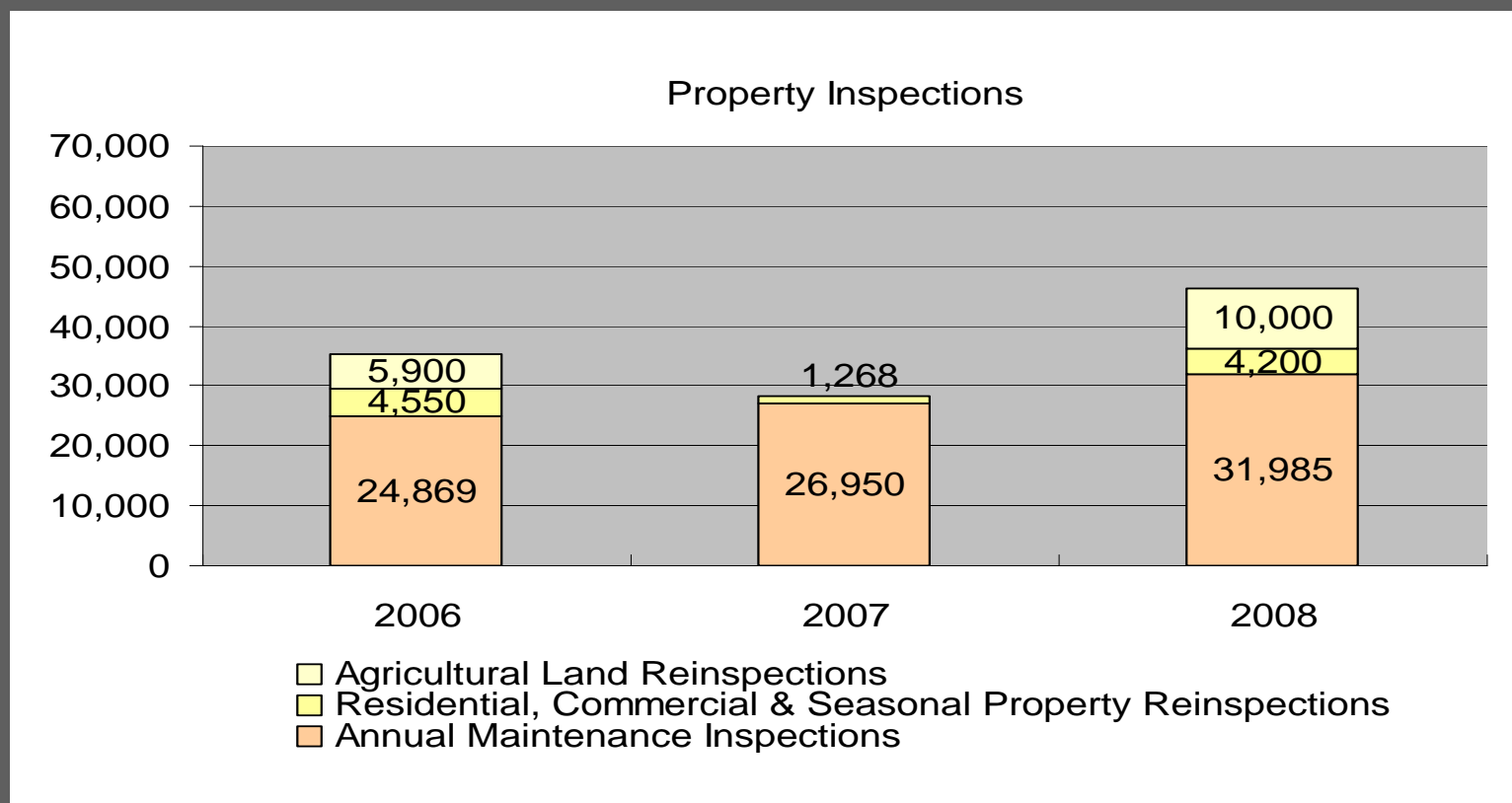
2007 – 2008 In Review

2007/2008 Assessment Maintenance

- Maintenance Performance Objective established by the Board
 - Municipalities with maintenance list in by October 1st – Maintenance to be completed on or before April 10th (Result: 312 of 315 done)
- Revaluation priority led to late start for 2008 maintenance
 - Increased number of assigned staff neutralized by increased volume of work
 - Some client expectations still not being met

2007 – 2008 In Review

2007/2008 Assessment Maintenance and Reinspections



2007 – 2008 In Review

Building Our Capacity To Serve You

- Long term SAMA funding plan established
- Lead role in Saskatchewan imagery collaborative
- Increased Agency emphasis on strategic planning and performance management
 - 2008 Performance Plan/performance measures
 - Lean Initiative
 - Enhanced 2009 Performance Plan and Capital Project planning
 - Board initiated long term planning for 2010-2013

2007 – 2008 In Review

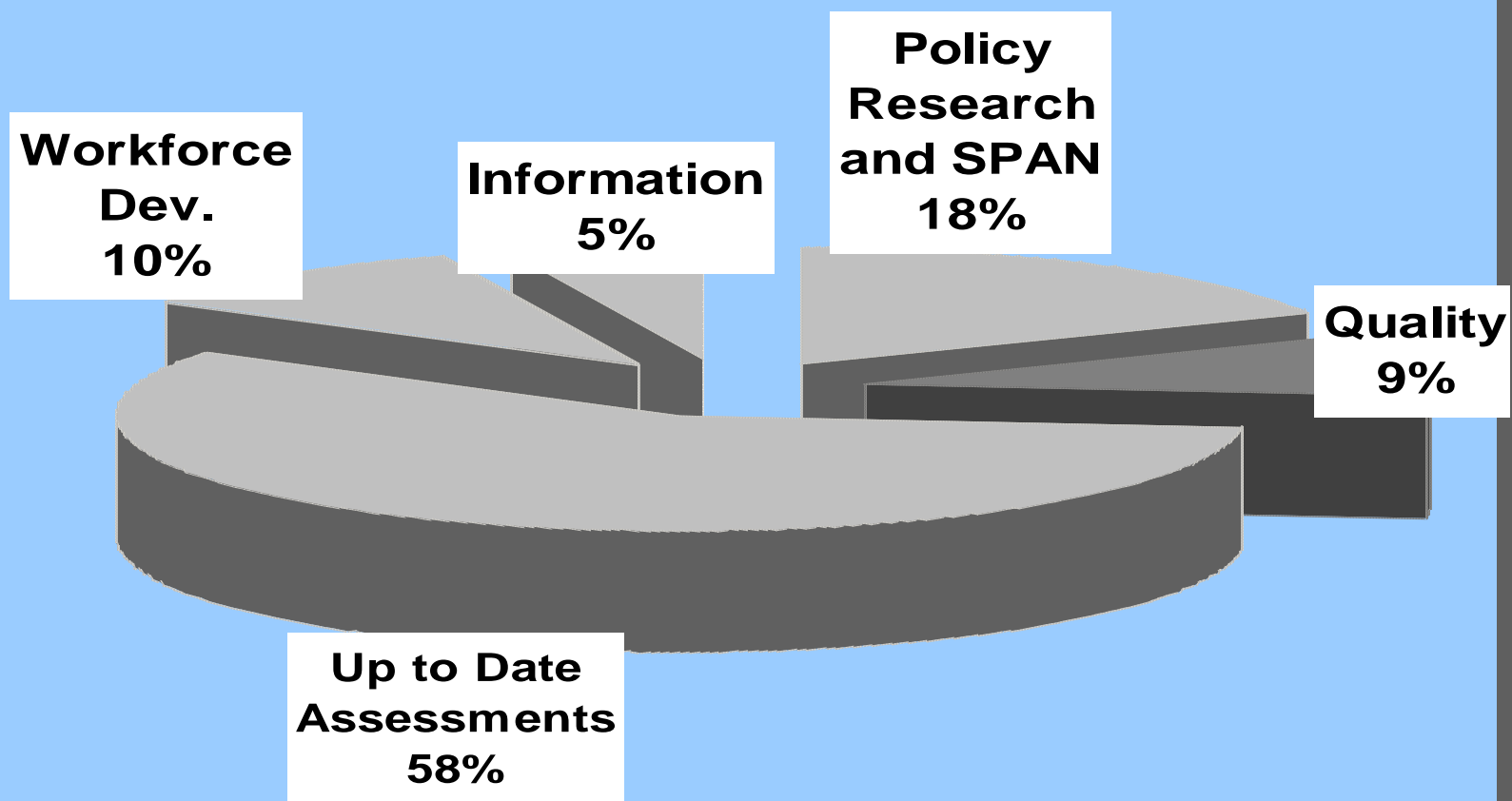
Building Our Capacity To Serve You

- Human Resources Division Renewal
- Collective Bargaining Agreement Signed
- HR Strategic Plan Established
- Employee Survey Conducted
- Major emphasis on staff training (E.G. Ombudsman's Fair Practices Training)

Looking Ahead to 2009

- Focus on meeting performance plan objectives.
 - Updated Assessments (Revaluation, Maintenance, Re-inspections, Market Data Validation)
 - Assessment Research, Policy Development
 - SPAN system support, maintenance and development
 - Quality Assurance
 - Assessment Service Provider of Choice
 - Improved Communication and Transparency

Looking Ahead to 2009 Expenditures by Program



Looking Ahead to 2009

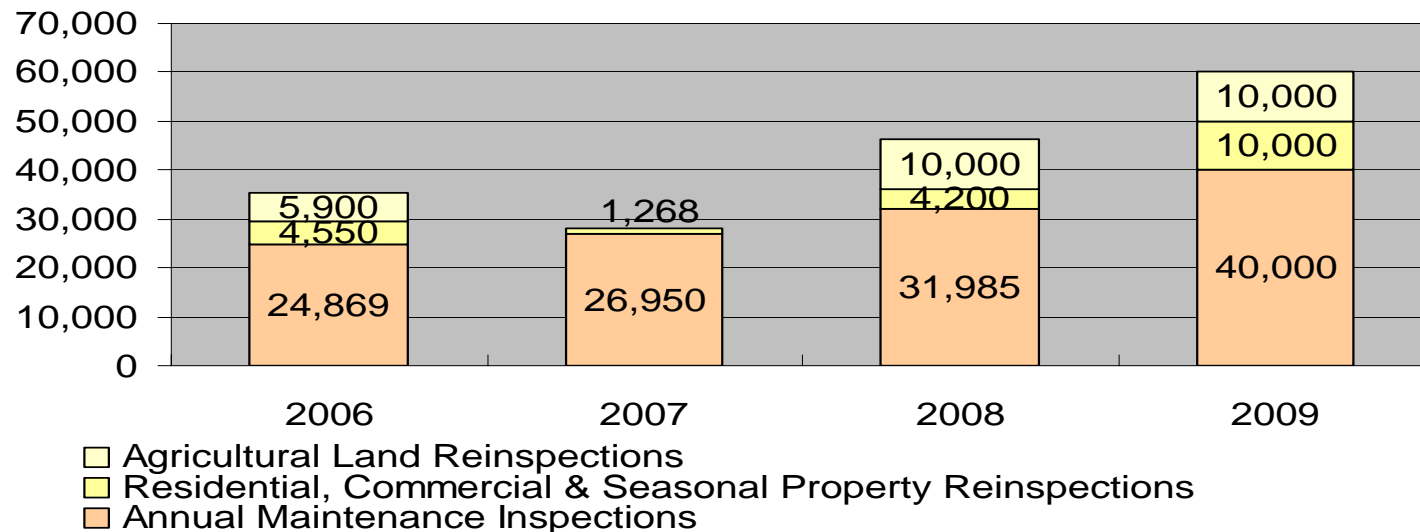
2009 Revaluation

- Preliminary values to SAMA clients (June/July 2008) – consultation and preview period to September 2008
- *Municipal Affairs currently conducting consultation sessions regarding 2009 property tax class percentages of value**
- 2009 assessed values to SAMA clients (Within 8 weeks of percentage of value decision by government – objective is delivery by November 30, 2008/December 31/2008)
- Attendance at open houses, ratepayer meetings, council meetings on request.
- Support of value activities through Boards of Revision and Saskatchewan Municipal Board in 2009 (14% of budget)
- 2009 Debriefing Review by SAMA Board in mid to late 2009

Looking Ahead to 2009

Timely Verification of Property Data: Assessment Maintenance and Re-inspections

2006-2009 Property Inspections



Looking Ahead to 2009

Timely Verification of Property Data:

- Maintenance service will be substantially improved for 2009:
 - Earlier start (start at least two months sooner than 2007/2008)
 - More resources dedicated to job to handle increased volume and improved timeliness (up by 10 staff for 2009)
 - Start 2010 maintenance as soon as practical in 2009
 - Raise our performance standards to ensure we meet our client expectations in 2009
- Property re-inspections will be higher for 2009, but continue to be a concern.
 - Addressing through internal process improvements (Lean), long term capacity building, supplementary budget request, and capital funding request

Looking Ahead to 2009

Timely Verification of Property Data:

Annual Market Data Validation Work

- Objective to move from batch to flow processes – verify sales and rental income data on a continuous basis
 - Catch up on processing of 2007 and 2008 sales in 2008
 - Expect 50,000 – 60,000 sales transactions to be processed and verified in 2009 and annually thereafter.
 - Collect and verify rental income data on 2500+ properties

Looking Ahead to 2009

Policy and Research

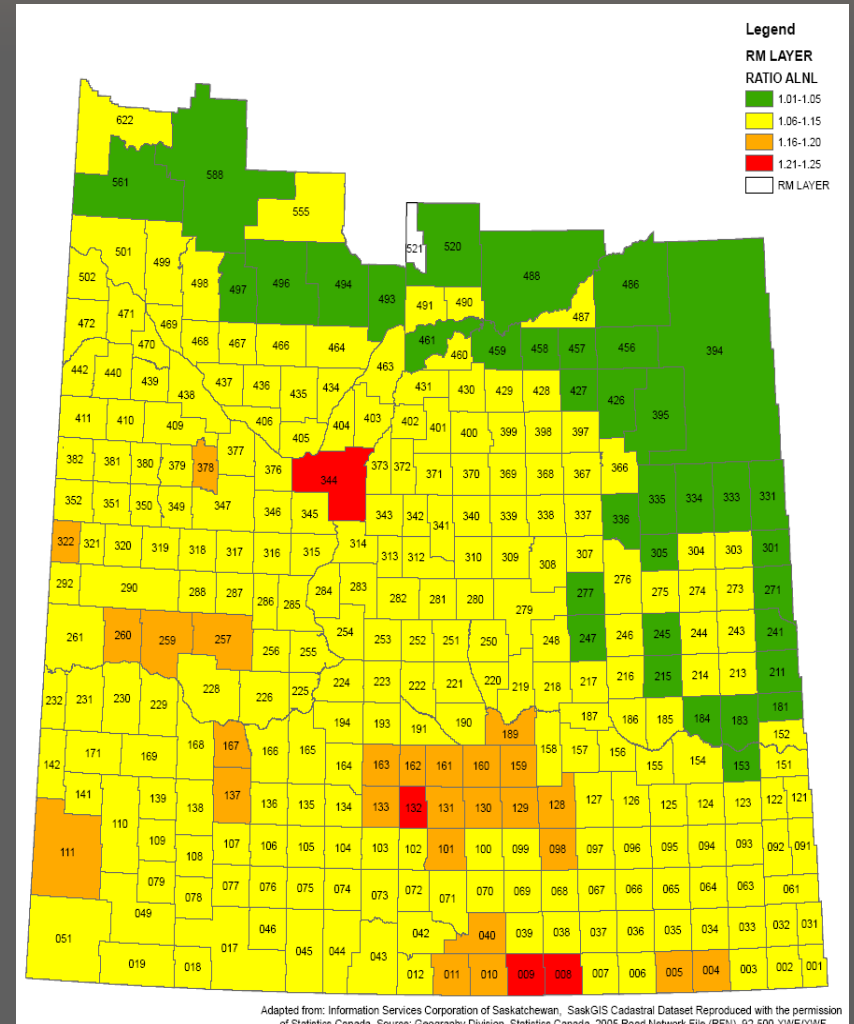
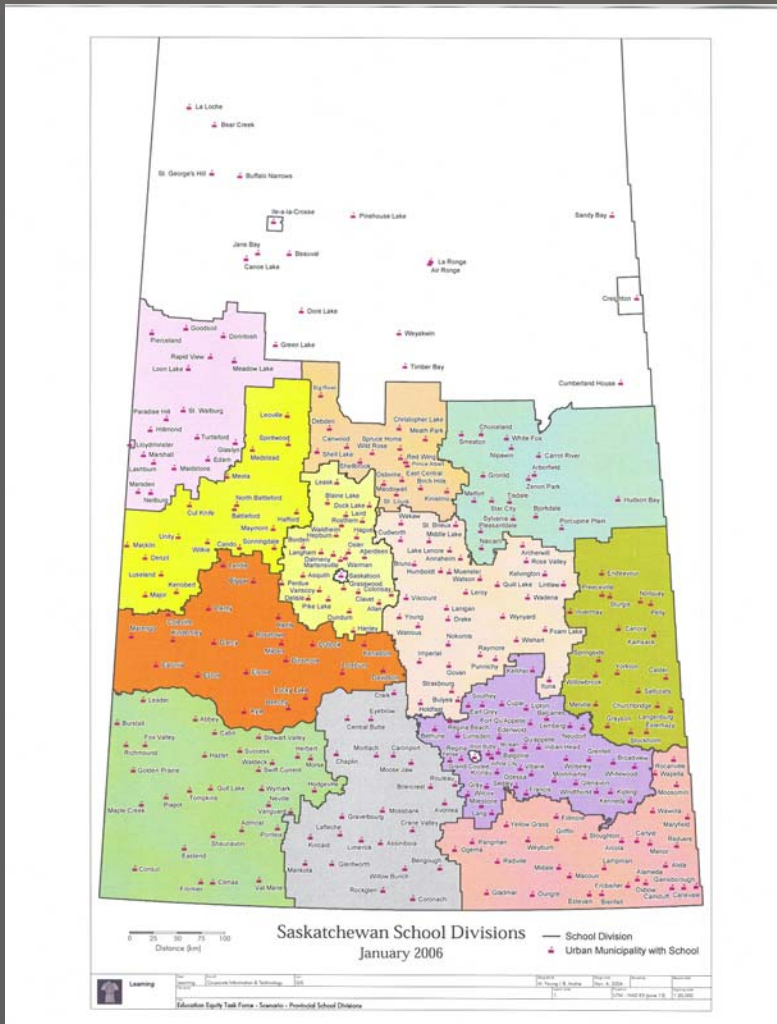
- Continued guidance, monitoring and training related to the 2009 revaluation
- Initiate consultations and research into 2010 base year rates (2013 revaluation)
- Conduct consultations regarding revaluation cycle length
- Research and develop new technological business solutions to improve assessment processes, communication and delivery

Looking Ahead to 2009

- Assessment Service Provider of Choice – Building our Capacity to Serve You Better:
 - Improved performance management/ accountability
 - Staff retention, recruitment and training
 - Quality Assurance: Both informal quality controls and formal quality audits
 - timely confirmations

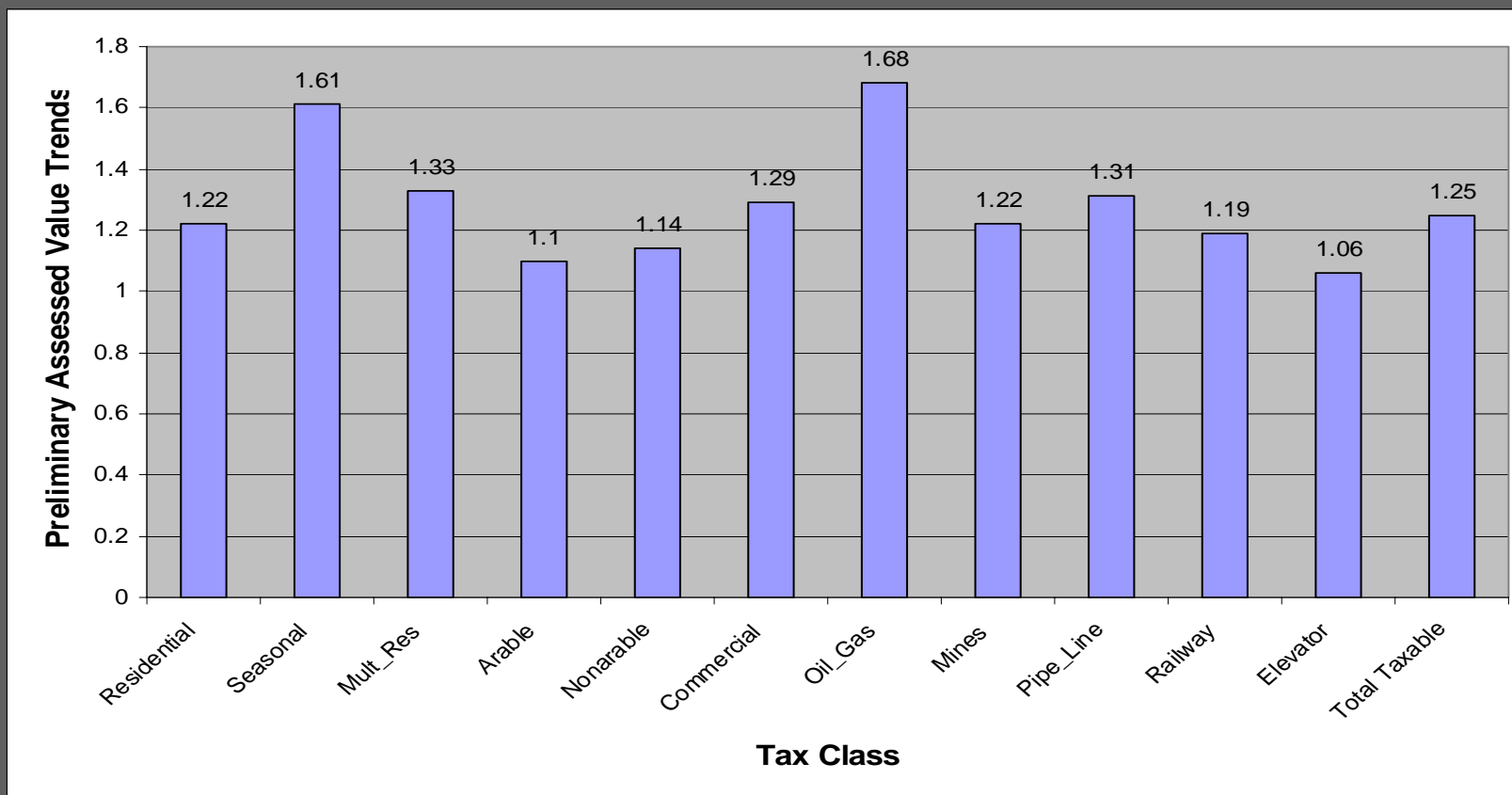
Looking Ahead to 2009

Provision of Information to Stakeholders and the Public



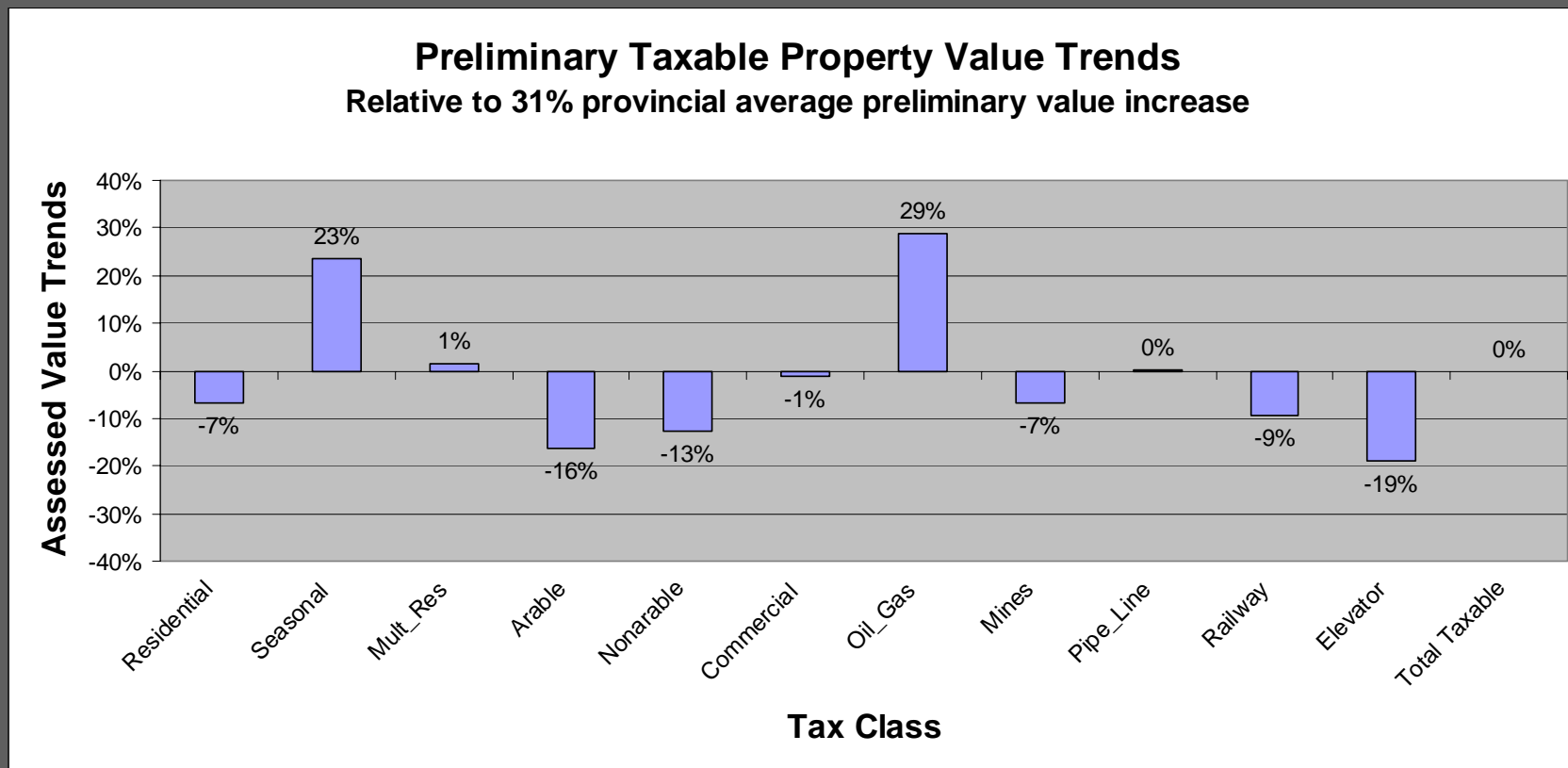
Looking Ahead to 2009

Provision of Information to Stakeholders and the Public



Looking Ahead to 2009

Provision of Information to Stakeholders and the Public



Looking Ahead to 2009

Provision of Information Through the SAMA Web Site

SAMA & THE ASSESSMENT PROCESS

DOING BUSINESS WITH SAMA

ROLL CONFIRM. & QUALITY ASSURANCE

PUBLICATIONS

WHAT'S NEW

EMPLOYMENT OPPORTUNITIES

FAQs

REVALUATION 2009

CONTACT US

SAMA
Saskatchewan Assessment
Management Agency

*"Pursuing excellence in
property assessment policy
and services for Saskatchewan"*

[Stakeholder Area](#) | [Board Member Area](#) |

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If you experience difficulties please use the [SITE MAP](#) for navigation.

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SAMA 2008 Annual Meeting
SAMA will be hosting its 2008 Annual Meeting on Thursday, June 12, 2008 at TCU Place in Saskatoon ... [view registration brochure](#)

Online Manuals

SAMA'S 2006 COST GUIDE

MARKET VALUE ASSESSMENT in Saskatchewan HANDBOOK

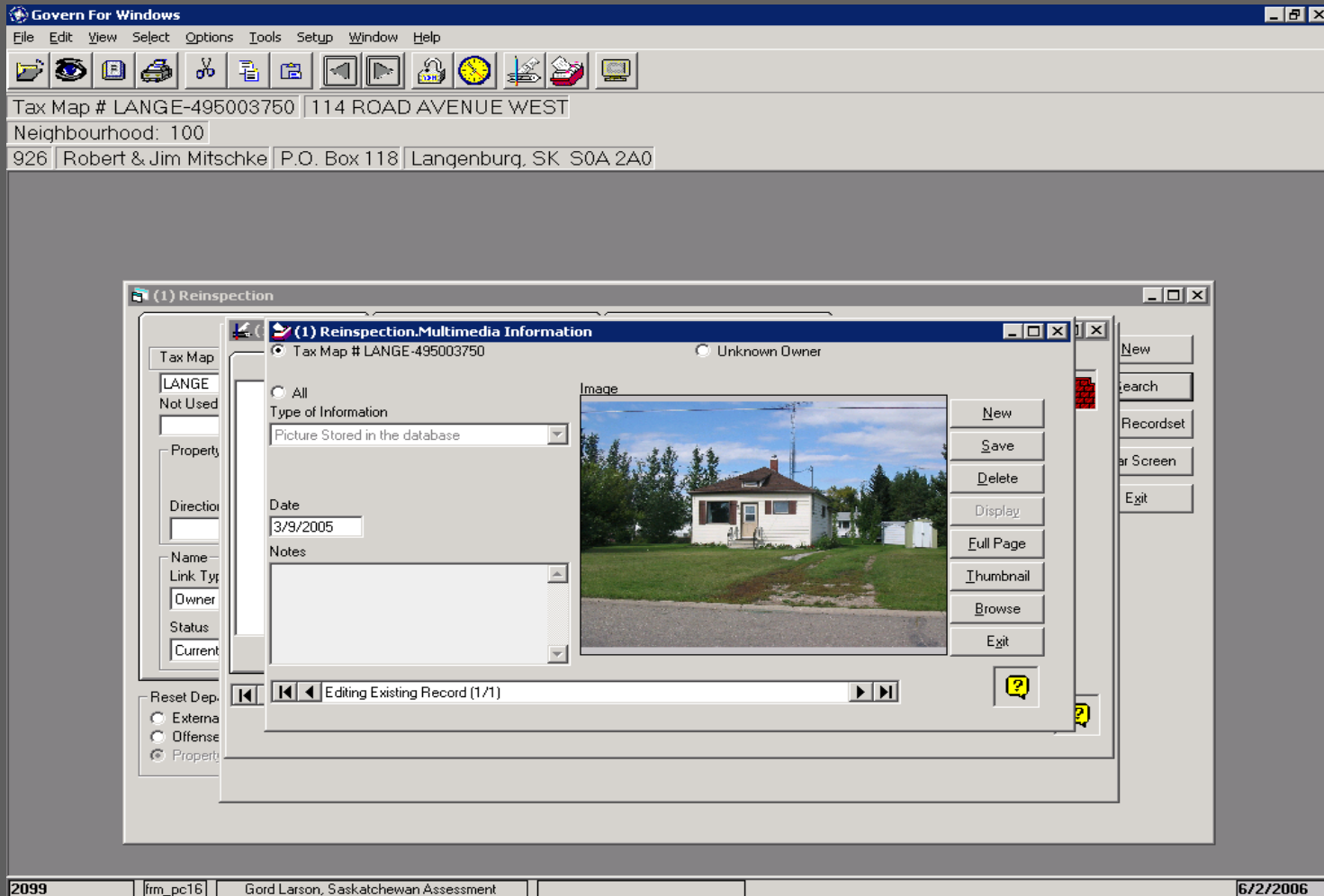
SASKATCHEWAN ASSESSMENT MANUAL 2006 BASE YEAR

Visitor 37,470 since July 4, 2003

Looking Ahead to 2009

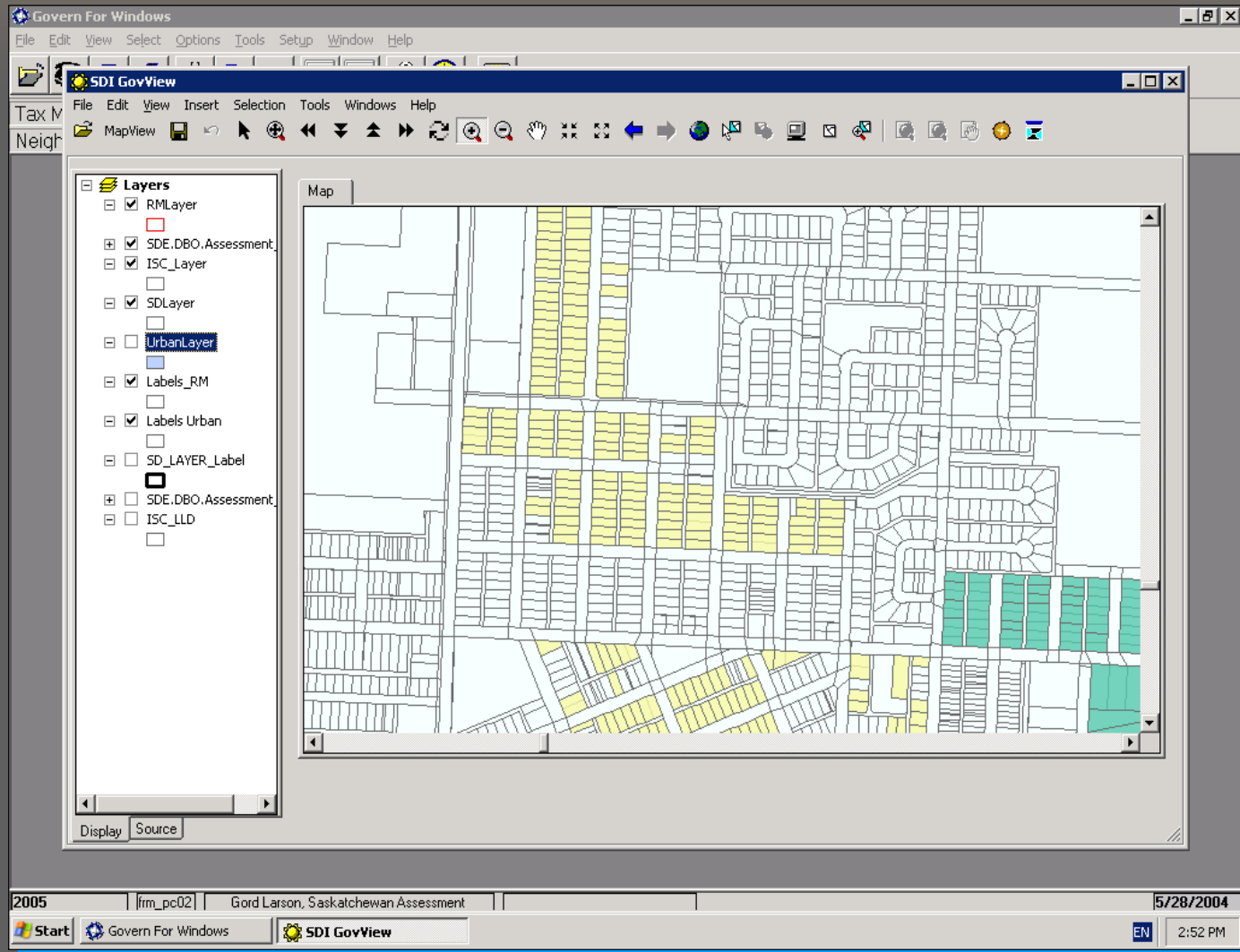
SPAN System – Development and Refinement

Focus on Keeping the System Current and Increased Efficiency



Looking Ahead to 2008

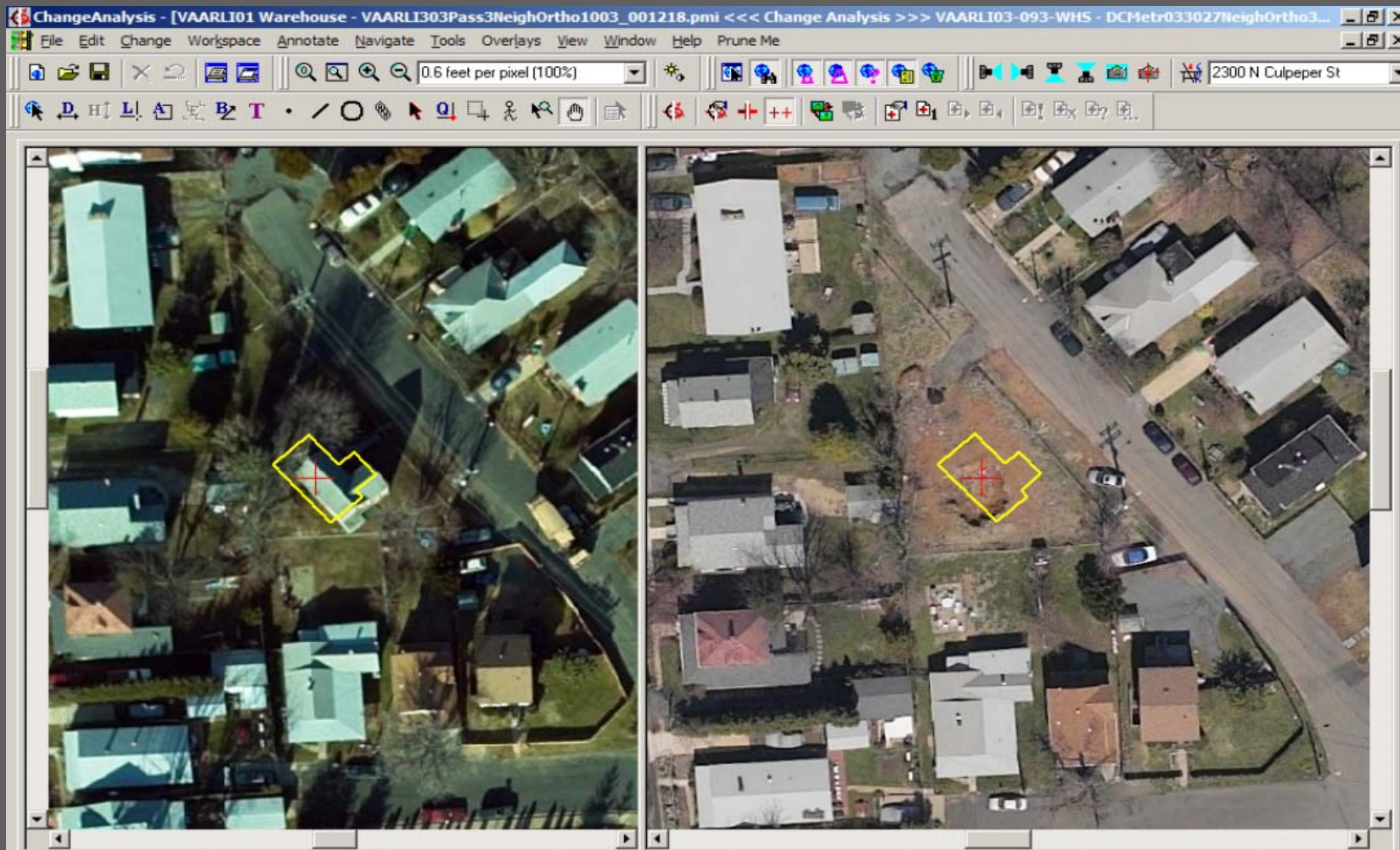
SPAN System – Building GIS Infrastructure



Looking Ahead to 2009

Research and Capital Funding Initiatives

Improved Data collection: Imagery Options, Handhelds



2008 SAMA Annual Meeting Annual Meeting Workshops

- SAMA Funding – The Next Four Years
- Administrative Perspective on the 2009 Revaluation
- Meeting Client Expectations
- SAMA and the Cities in 2009 (AM only)
- Tools and Techniques to Communicate the 2009 Revaluation (PM only)

2008 SAMA Annual Meeting CEO Report

Questions and Discussion