



DELIVERING ON OUR
COMMITMENTS



2018
ANNUAL
MEETING



Saskatoon Inn
& CONFERENCE CENTRE

APRIL 11,
2018

CEO Update

Agency Overview

2018
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sama
SASKATCHEWAN ASSESSMENT
MANAGEMENT AGENCY



- Agency created in 1987
- 7 person Board of Directors
- Assessment governance for entire province
- Assessment services for 762 municipalities
- 845,000 assessed properties
- 8 regional offices
- 154 permanent staff
 - 112 in Assessment Services
 - includes 6 for Moose Jaw contract
- Total cost per property = \$22.07 (includes governance)
- \$18.5M operating costs (2017)
 - Excludes Moose Jaw contract & capital funding for TI program
- Assessments provided \$2 Billion Revenue for Municipalities and Education (2017)

Vision and Mission

Vision

- SAMA is the recognized leader and authority on property assessment, and Saskatchewan's service provider of choice.

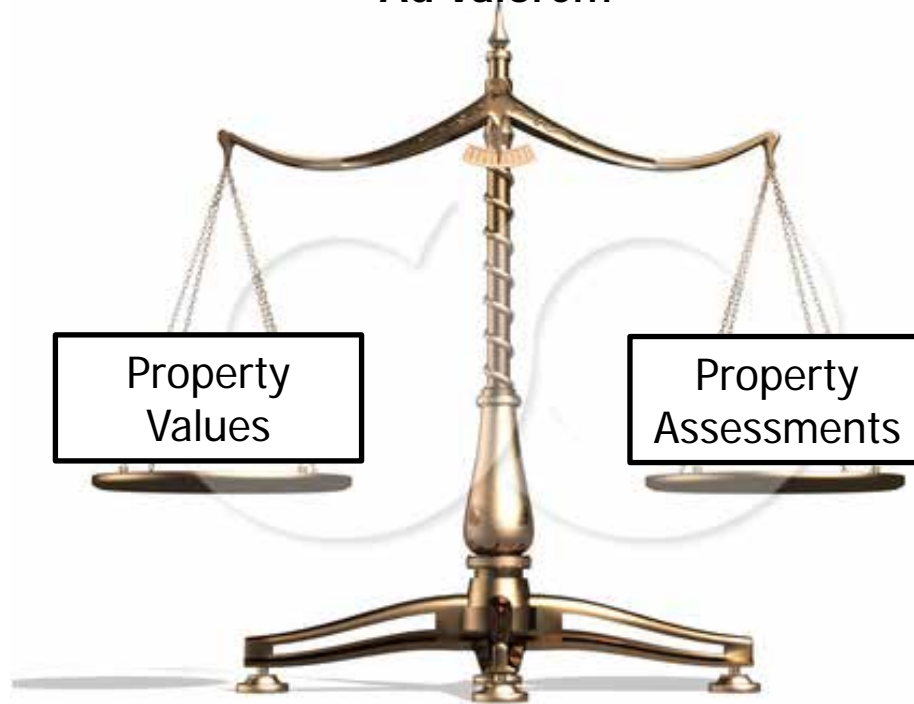
Mission

- SAMA develops, regulates and delivers a stable, cost-effective assessment system that is accurate, up-to-date, universal, equitable and understandable.



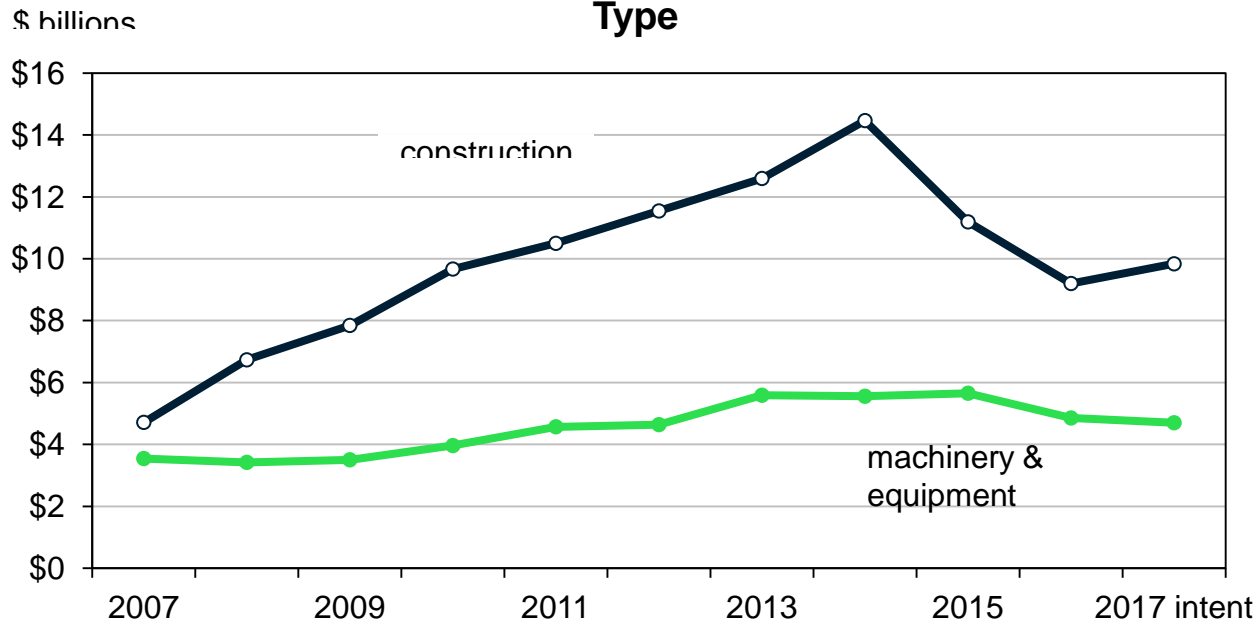
Assessment Principles

Ad Valorem



We Capture Real Estate Growth

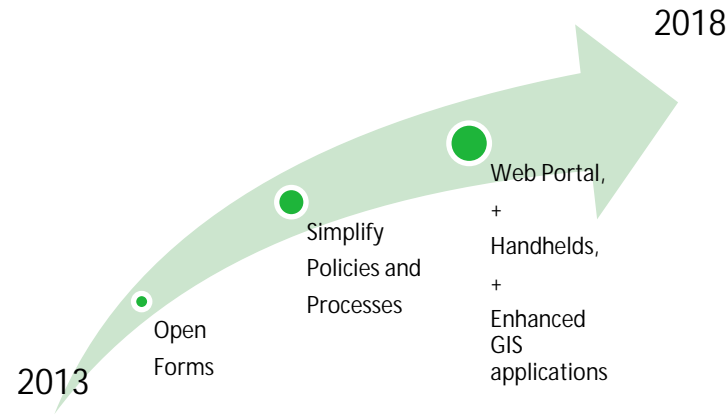
Figure 3: Total Capital Investment, Saskatchewan, by Type



SAMA's 2014 to 2017 Goal

- Increase the number of property reviews from 50,000 (2012) to 100,000 per year by 2018, **while improving product quality**, increasing employee engagement and fulfilling our core responsibilities.
- Build capacity to capture \$30+ M annual revenue currently being left on the table for local governments

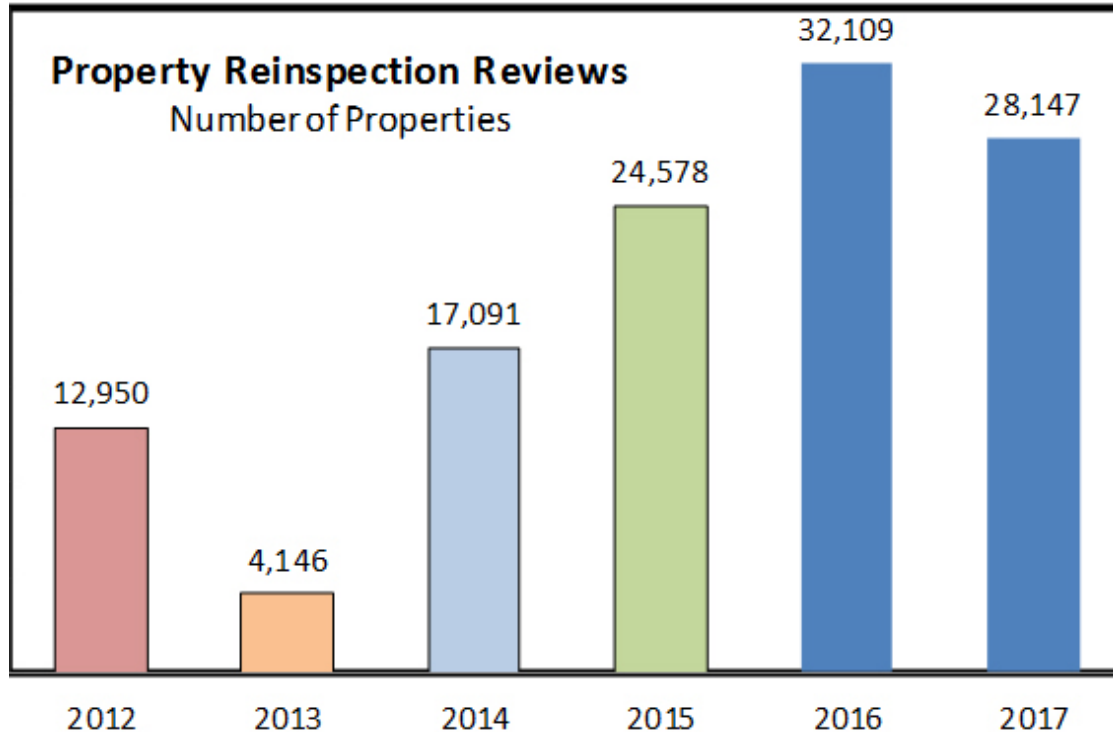
Innovate our way to a 12 year inspection cycle



Re-inspection Results

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2017 Was a Tough Year:

Thank you for working with us through the challenges!

- 2017 Revaluation Challenges: Decreasing market values since the January 1, 2015 valuation base date, % increases and tax increases gave us an uphill battle
- System delays set us back in the first quarter
- After a 2 to 3 month delay, we were finally able to deliver all the new maintenance and revaluation numbers.
- System issues also delayed 2017 assessment return release to May 11, 2017
- Handled 7200 appeals
- Inspected a record number of properties (67,000)
- Continued progress on technical infrastructure(TI) deliverables, training, change management, contract services
- Received solid budget support from municipalities and government to retain existing staff levels – Thank you!

2017 Was a Tough Year:

Thank you for working with us through the challenges!

- By the end of 2017 client relations were shaken, but we still have the trust of our municipal clients
 - Board of Revision Capacity Issue: A number of the 2017 appeals were still waiting for BOR decisions in March 2018 – delayed confirmations for many municipalities.
 - Delayed 2018 assessment return release to April 6th.
 - Affected the Table of Confirmed Assessment Totals as of March 1, 2018 – Excluded from Annual Report
 - Updated confirmation statistics available on SAMA web site.

What will we have to work with in 2018?



2018 Major Deliverables

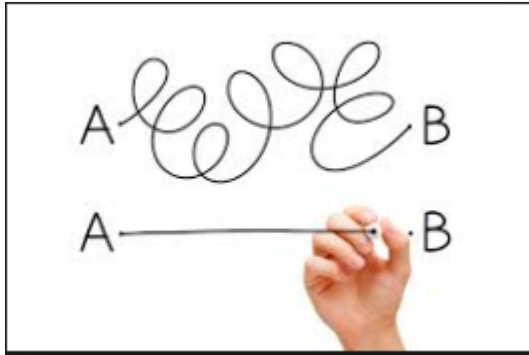
- 100,000 + property reviews/inspections
 - We are closer to achieving this than most think.
 - Starts with timely delivery of 2018 maintenance
- Support of value – appeal levels could continue to be 2X greater than previous cycle because of the leveling off of values since the base date
- Completion of preliminary 2021 assessment manual
- Technology Infrastructure (TI) Program
 - RDC Tablets fully implemented in Q2 2018
 - Web portal scheduled for completion in Q3 2018
 - Matix and GIS Explorer
- Bargaining

SAMA's 2018 to 2021 Strategic Directions

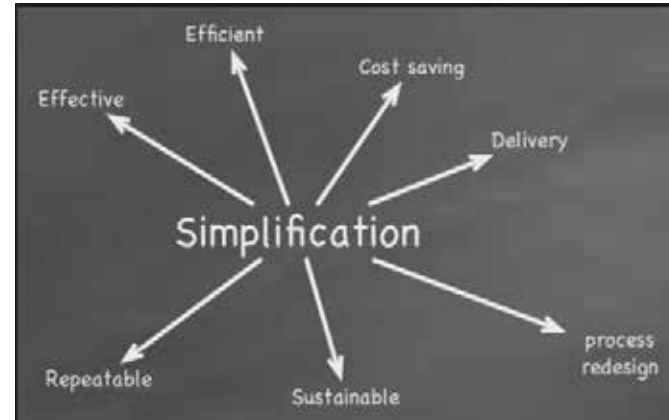
1. Maintain and enhance stakeholder supported funding model for SAMA.
2. Simplify and streamline to improve efficiency and effectiveness.
3. Use policy, process and technology changes together to deliver on the promise to radically increase property inspections.
4. Strengthen the capabilities of all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

Simplify and Streamline to Improve Efficiency and Effectiveness

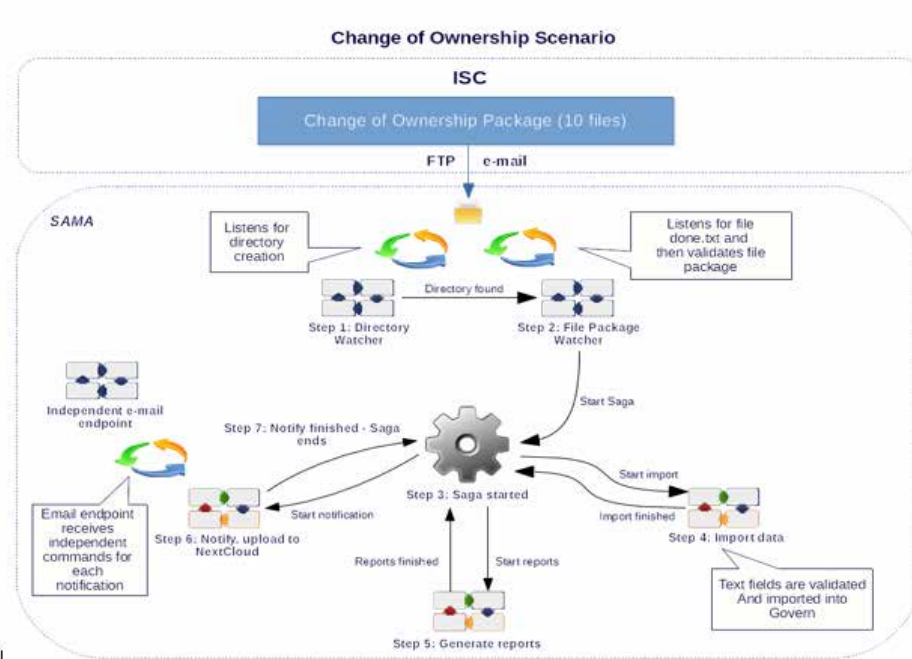
Business Process Improvements



Systems and Valuation Models



Process Automation



Going Forward - More Reliance on Technology



SAMA's Goal - Putting the Pieces Together

SAMA's 2014 - 2017 funding plan is focused on:

- Improving Employee Ability to Deliver Services to our Clients
- Simplifying Valuation Policies
- Implementing New Technologies
- Providing Employees with the Tools and Training for Professional Success
- Increase Employee Engagement
- Improve Business Processes



Handhelds: Finally Ready for Prime Time



Next Priority – SAMA Web Portal

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

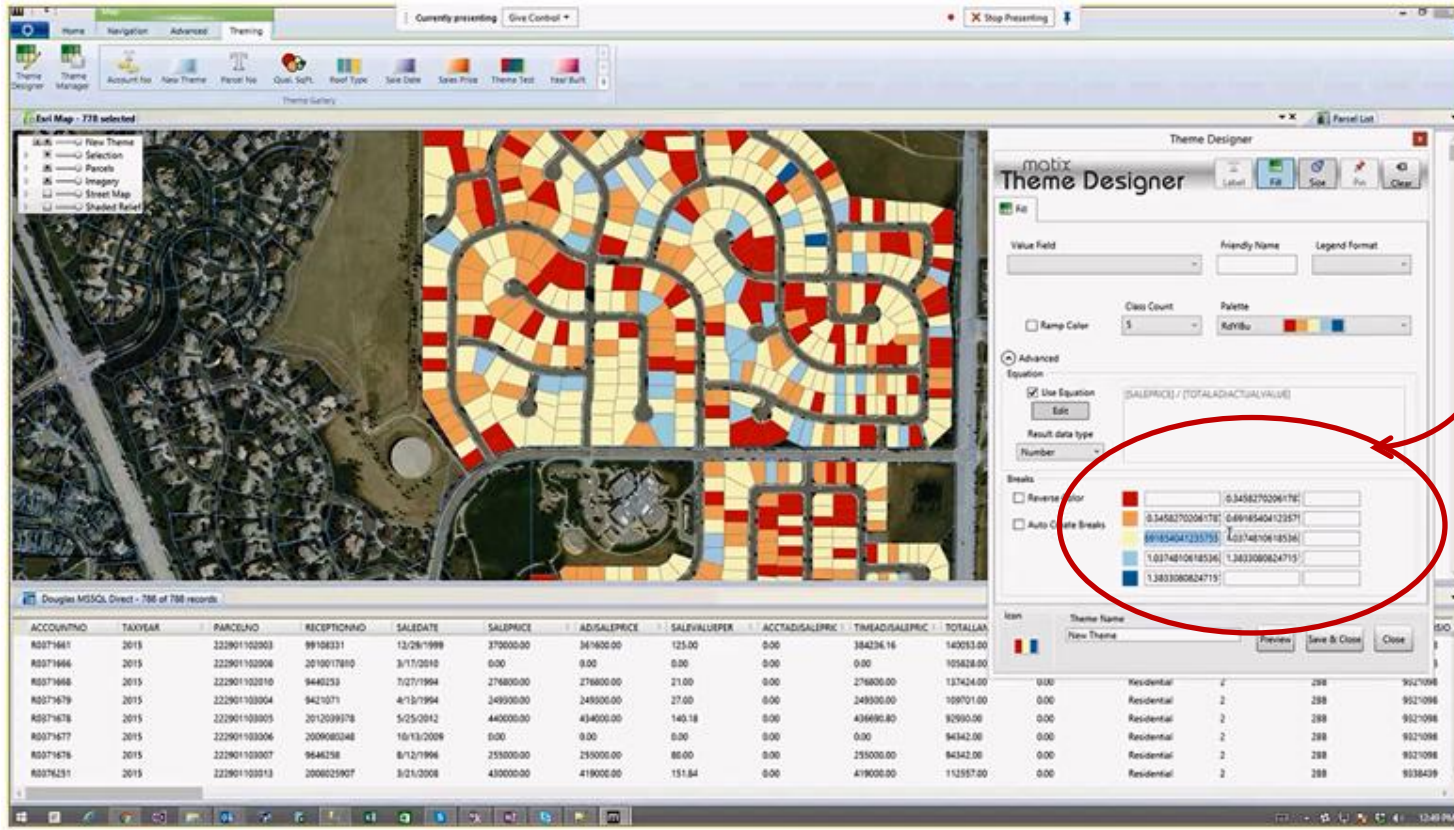
Make reports available as an online service:

- 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.

Other 2018 Technology Priorities - Enhanced GIS for Staff



The screenshot shows the ArcGIS Theme Designer interface. The main map area displays a parcel layer with a color-coded legend. The 'Theme Designer' panel on the right is open, showing the 'Breaks' section. A red circle highlights the 'Breaks' section, which contains five rows of data representing value ranges and their corresponding colors.

Color	Value Range
Red	0.34582702061782
Orange	0.34582702061782 - 0.69165404123571
Yellow	0.69165404123571 - 1.03748106185361
Light Blue	1.03748106185361 - 1.38330808247151
Dark Blue	1.38330808247151

Below the map, a data table is visible, showing columns for ACCOUNTNO, TAXYEAR, PARCELNO, RECEPTIONNO, SALES DATE, SALEPRICE, ADJSALEPRICE, SALEVALUEPER, ACCTADJSALEPRC, TIMEADJSALEPRC, and TOTALTAX.

Color Pallet & 5 breaks

We can't do it without our Employees



**We would not be here without your
ongoing support!**

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**No duty is more urgent than
that of returning thanks.**

James Allen

CEO Update

Questions?

