

Alberta Assessors' Association

**Pre-Conference Education Program
April 23-24, 2018**



Calgary Sheraton Cavalier

2620 32 Ave NE

Calgary, Alberta T1Y 6B8

Phone: 403-291-0107



2018 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 include lunch on Monday and Tuesday

Member/Non-member pricing applies

Coffee service is provided each day between 10 a.m. and 10:30 a.m.

Monday April 23

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

Tuesday April 24

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.



2018 Pre-Conference Courses
Monday April 23, 2018

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

This is Day 1 of a two-day workshop.

Join Lavinia Henderson of Civic Solutions for this two-day workshop on tax and assessment for municipal tax/assessment clerks. This session is perfect for anyone new to their role as an assessment and tax clerk. You'll be guided through the requirements, actions and processes for the year covering everything from legislation, assessment/tax rolls, managing property information, levy calculations and roll balancing, assessment changes, how taxation occurs, bylaws and agreements, internal control processes, charges, write-offs and cancellations, handling payments and collections, tax recovery, and year-end processes. Registrants will receive various electronic tools and sample documents.

Instructor(s): Lavinia Henderson, Civic Solutions
Time: 8:30 am to 4:00 pm
Location: Schoolroom
Min/Max Participants: 35/125
Re-certification Credits: 6 Learning-based for AMAA members
Cost: \$325 Member/\$400 Non-member (+ GST) for Day 1 + Day 2

Professionalism and Ethics (2018PC-02)

This may be a two-day workshop.

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 first offering of the Association's Professionalism and Ethics course based on the 2015-approved Code of Conduct and Ethics and Professional Standards. It is both a learning opportunity and a test of the material. **Senior assessors, assessor-supervisors and assessor managers are encouraged to participate but all regulated members are welcome.** Participants will be asked to interact, evaluate and provide feedback in the manner of a critical analysis the material in order for revisions or adjustments may be made, as necessary so that the course content is wholly appropriate for future delivery. 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 IMA 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: Schoolroom
Min/Max Participants: 15/30
Re-certification Credits: 6 Learning-based
Cost: \$275 Members Only (+ GST)

2018 Pre-Conference Courses
Monday April 23, 2018

Worksafe III (2018PC-03)

Workplace violence is everybody's concern. Events across North America have highlighted the need for corporations to have the ability to protect their most important asset; their people. The StreetSense WorkSafe program utilizes a Reality Based IntelligenceLed approach to violence prevention and personal safety. The approach is unique in that it examines threats from both a micro and macro perspective and provides clients with increased safety and security for their employees and management as well as a flexible platform for future planning and training.

Intelligence Led violence prevention provides a *"Big Picture"* view of organizational vulnerability using a variety of sources to create a three hundred sixty degree picture of potential threats, outlines areas of concern and makes planning and allocation of resources more efficient.

Personal safety training including self defense as part of the equation in reducing the impact of violence in the workplace. Policies and procedures must be realistic and include provisions for training all staff on workplace violence prevention and other potential threats to their safety and security. Training increases survivability. Statistically the more people that are trained, the more that will survive workplace related incidents of violence by the skills and confidence to act proactively.

Instructor(s) Kerry Sauve, StreetSense Safety Inc.
Time: 8:30 am to 4:00 pm
Location TBD
Min/Max Participants: 20
Re-certification Credits: 6 Learning-based
Member Cost: \$275 Members /\$300 Non-Members (+GST)

Advanced Excel for Assessors (2018PC-04)

For assessors, data is truly a double-edged sword: it is essential for doing our jobs, yet can be the worst possible beast to wrestle meaning out of in order to do our jobs.

Fundamentally, assessors need to work with data in three different ways:

1. Manipulate multi-source data so it can be combined
 - Text to Columns & Concatenate, Vlookup
2. Analyze data for meaning
 - Logic Formulae, Filters & Subtotals
3. Display assessment data for external consumption/education
 - Pivot Tables, Pivot Charts

This course will present some different tools in Excel that can help the assessor with the above using a practical, hands on approach. The presentation will be based on Excel 2010, so for optimal engagement it is recommended that this version of Excel is loaded on your laptop.

Instructor(s): Mike Arnold, AMAA
Time: 8:30 am to 4:00 pm
Location: City of Calgary ABU Computer Lab



Min/Max Participants: 10/16
Re-certification Credits: 6 Learning-based
Cost: \$250 Member/\$275 Non-member (+ GST)

Legislation and Regulation – Interpretation and Implementation (2018PC-07)

This session will review the regulatory framework and changes as they apply to

- Assessment/tax rolls, notices and tax certificates
- Bylaws
- Notification of Assessment date/certification process for appointed assessor
- Brownfields
- Conservation reserves
- Changes to s.305 and the impact on municipalities
- Closed hearings and sealed evidence
- Changes to the inspection process (s.294)
- Access to information for property owners
- City Charters and any legal implications for municipalities

Instructor(s): Carol Zukiwski and guest presenters
Time: 8:30 am to 4:00 pm
Location: Schoolroom
Min/Max Participants: 10/50
Re-certification Credits: 6 Learning-based
Cost: \$250 Member/\$275 Non-member (+ GST)



2018 Pre-Conference Courses
Tuesday April 24, 2018

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

This is Day 2 of a two-day workshop.

Professionalism and Ethics (2018PC-02)

This is Day 2 of a two-day course.

Retirement Planning or Life-Planning for Retirement (2018PC05)

"Retirement is like a long vacation in Las Vegas; the goal is to enjoy it to the fullest, but not so fully that you run out of money" (Jonathan Clements).

Delegates who choose this session will explore different aspects of retirement – or Life Part Deux – with three presentations:

5 Things I Wish Someone Had Told Me Before I Retired

One of the major reasons to engage in a retirement plan is to "avoid making major errors." Too often retirees say, "If only someone had told me, I would have ..." This presentation will provide both working tools and background information to help you move your retirement plan beyond the money issues and toward the lifestyle you would like to lead.

Wills, Estate Planning and Long-term financial stewardship

Life is full of surprises – good and bad – and even the best laid plans can take a spin. This session will offer advice on effective long term financial and resource planning that will ease the pressures of end-of-life considerations.

Local Authority Pension Plans

This interactive session will be driven by needs of the group, reviewing all aspects of the pension plan, what happens in a termination scenario, program options and, if time will be set aside for individuals to review their pension profiles.

Instructor(s):	Patricia French, Retirement/Life Challenge Ltd Doris Bonora, Dentons LLP Phil Mak, LAPP
Time:	8:30 am to 4:00 pm
Location:	Schoolroom
Min/Max Participants:	10/25
Re-certification Credits:	6 Learning-based
Cost:	\$225 Member/\$275 Non-member (+ GST)



Intermediate/Advanced Ad Hoc Query (2018PC-06)

This session will review some basics, then take a run through the CAMALot tables so people can see how the CAMALot naming conventions make it very easy to find where data is stored. Participants will then build simple single table queries, then move into multi table queries, and even get in to creating calculated fields. Also to be reviewed are the GIS tables, the taxpassoff table (i.e. must recalculate to have current data), etc. **A laptop is required; CAMALot loaded is an added benefit.**

Instructor(s): Brad Hurt, AMAA
Time: 8:30 am to 4:00 pm
Location: Schoolroom
Min/Max Participants: 10/25
Re-certification Credits: 6 Learning-based
Cost: \$300 Member/\$375 Non-member (+ GST)

Section 295(4) Applications for Dismissal (2018PC-08)

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: \$175 Member/\$225 Non-member (+ GST)



Pre-Conference Course Instructors

Lavinia Henderson, CLGM is Civic Solution's president and founder. Her 30+ years' experience in municipal government includes serving as Chief Administrative Officer, Municipal Administrator and Director of Finance for one rural and two urban municipalities. Lavinia has actively promoted and advanced municipal administration through her work with the Local Government Administration Association of Alberta (LGAA). Lavinia's passion for local government and drive to coach others in the field led her to create Civic Solutions' eStudies program. As well, Lavinia and Civic Solutions played a key role in launching the Alberta Elected Officials Education Program and assisting it in becoming Canada's leader in municipal elected official education.

Carol Zukiwski, LLB, is a partner at RMRF and volunteers as the Alberta Assessors' Association Parliamentarian. Carol was admitted to the Alberta Bar in 1989 and, currently with RMRF, her practice is primarily focused on assisting municipalities and the provincial linear 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..

Michael Arnold, AMAA, Assessment Coordinator & Analyst, City of Red Deer started his assessment career with the City of Red Deer in 2006. He received his accreditation in 2011 and became the Coordinator for Residential/Multifamily assessment team in 2013. Prior to assessment, he worked for fifteen years in the Forestry sector in northern BC. Both careers involve dealing with large quantities of data from various sources; being able to manipulate and merge the data, and extract meanings and trends. Through both careers he has gained considerable experience in working with many different platforms (i.e. he's old enough to remember using AppleWorks, LOTUS 1-2-3, and dBASEIV), and has been working with Excel since it first came out in Office 95. He is currently working towards his B.Comm through Athabasca University.

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. He has a keen interest in odd or unique assessment issues and has developed new processes to deal with interesting issues along with his colleagues. 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. Most recently, the pipe band of which he is a member, the Rocky Mountain Pipe Band of Calgary, won 1st place at the North American Pipe Band Championships in 2017. Daniel lives with his beautiful wife and his two young children in Calgary.

Kerry Sauve is a veteran Peace Officer with over 23 years of experience working in maximum security facilities. He worked as an ERT (*Emergency Response Team*) member/instructor, as well as in a(n) security/intelligence officer specializing in gangs, organized crime and human trafficking. He is also an educator and regularly instructs as a guest lecturer at the Solicitor General and Public Safety Staff College, the Canadian Border Services Agency, as well as for numerous educational institutions (*University of Calgary, Mount Royal University, Bow Valley College, and Ambrose College University*).

He is a Security Analyst and Private Security Contractor for CASS Canada (*Centre for Advanced Security Studies*) providing education, training, and consulting for corporate clients. CASS provides corporate resilience for global energy companies and offers a full suite of protection services.

Patricia French, Registered Retirement Consultant is a Financial Counsellor and has been practicing in the industry for over 15 years. She began as a Financial Counsellor with the not-for-profit agency, Credit Counselling Services of Alberta Ltd., now called Money Mentors. Patricia is now employed with SISIP Financial Services, the sole provider of financial planning and counseling services for the Canadian Forces. She is an experienced facilitator and has taught workshops on topics such as budgeting, building and rebuilding credit, debt management, financial and retirement planning. Patricia is co-author of the book, *10 Things I Wish Someone Had Told Me about Retirement*.

Doris Bonora is the Canadian group leader of Dentons' Trust, Estates and Wealth Preservation practice. Her practice focuses on will planning, estate planning, estate administration, estate litigation and trusts. Her practice involves developing estate plans for her clients that match their families and their needs. She has been involved in estate litigation involving farms, support claims for spouses, support claims for dependent children; challenges to capacity to make a will and all litigation involving estate administration issues. She takes a particular interest in attempting to settle disputes so that families are not torn apart in litigation and tries to achieve the right balance between a passionate advocate and a measured approach to achieve results.

Phil Mak assists with Client Education for the Local Authorities Pension Plan (LAPP). The Local Authorities Pension Plan (LAPP) was established in 1962 for employees of local authorities in Alberta. These employers include cities, towns, villages, municipal districts, hospitals, colleges, school boards, and many other public service organizations. LAPP is administered by Alberta Pensions Services Corporation (APS). There is a lot that goes into planning for your retirement. The earlier you start your retirement planning, the more prepared you will be when the time comes.



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 – 6 Learning Credits
Instructors: Lavinia Henderson and Guests
- 2018PC-02 Professionalism and Ethics – 6 Learning Credits
Instructor: Colleen Symyrozum-Watt, M.Ed.,
- 2018PC-03 Worksafe III – 6 Learning Credits
Instructor: Kerry Sauve
- 2018PC-04 Advanced Excel for Assessors – 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 26

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

- 2018PC-01 (Day 2) A Year in Municipal Property Tax Administration – 6 Learning Credits
Instructors: Lavinia Henderson and Guests
- 2018PC-02 (Day 2) Professionalism and Ethics – 6 Learning Credits
Instructor: Colleen Symyrozum-Watt,
- 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



Registration Information

The Pre-Conference course fees cover the cost of instruction and materials. To register for any of the Pre-Conference courses, please complete the 2018 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 April 6, 2018. Pre-Conference fees **include a buffet lunch**. 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 must pay the 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 29, 2018. Participants will be contacted if the course is cancelled. No refunds will be issued for confirmed Pre-Conference course attendance after April 13, 2018, however replacements will be accepted.

Accommodations

The Sheraton Cavalier 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 23, 2018 to take advantage of the block rate.**