

2022 Annual Report



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President's Report



The past year, like many, has presented numerous challenges but also some wonderful opportunities. It certainly has been a fantastic opportunity for me to work with the Executive Committee and our other committees to continue to provide education, advocacy and promote our ethical standards. From early on when we approved our business plan for the year to now when we are preparing for our annual conference, there has been so much that has happened but the time has seemed to pass so quickly.

I am very excited and optimistic for our upcoming annual conference which is going to be our first in-person event since the start of the COVID-19 pandemic. I cannot begin to express my gratitude for all of those who have helped to put us in a position to make this event happen. My hopes are for an engaging, educational and uplifting event

where we can celebrate our profession together once again. I hope to see you there.

Education

Our normal education program was disrupted this year with the very unfortunate timing of new COVID-19 restrictions in the fall which caused the cancellation of our Fall Symposium. However, there were several other educational opportunities that were provided such as a two-day residential property training session and a session on a recent case of the Land & Property Rights Tribunal relating to M&E assessments. In addition, our upcoming conference will have a host of unique and interesting educational offerings. We continue to hold advancing high-quality educational opportunities as one of our major objectives and we will continue to do so in future years.

Membership Cultivation

It has been wonderful to see so many new members join the association over the last year and so many who have achieved their AMAA designation. It has also been great to see an emerging trend of more property tax consultants joining the association as well. Cultivating our membership so that we have a more visible presence across our industry is so important and it has been gratifying to see the progress in this area.

Collaboration and External Relationships

A big role of the association is to maintain relationships with our external partners at the Government of Alberta, other provincial assessment organizations, Alberta Municipalities, Rural Municipalities of Alberta and others. This year we maintained good lines of communication with these partner organizations through various committees and ongoing dialogue. Our partnership with the Institute of Municipal Assessors continues to grow with the approval of a terms of reference for our ongoing discussion related to our signed Memorandum of Understanding. These partnerships serve to enhance our reputation and our ability to be an excellent organization for our members.

Advocacy

This year seemed to be filled with advocacy of all kinds. The one which was the most prominent though was our advocacy related to our continued existence as a registered organization under POARA which we now know will take on a new form in the future. This involved a significant amount of work from our Legislative Policy Committee for which I am grateful as well as many discussions with Government of Alberta employees. All indications are though that the Alberta Assessors' Association will remain registered in the new legislative framework.

President's Report (cont'd)

Financial Stability

Our finances remain in good standing thanks to prudent financial planning and restraint where necessary. We are well-positioned to be financially stable into the future. While we did decide to increase membership fees for the first time in several years, we felt this was a necessary move so that you, as members, always have confidence in our financial position. This also allows us to continue to deliver on our mission to provide expertise and leadership for our members and our vision to be recognized as experts and leaders throughout Canada.

The reports that follow from the chairs of our very talented committees outline an incredible amount of work conducted by an amazing group of volunteers who ensured the continued excellence of our organization. It always amazes me what we can accomplish together and I am so grateful for the commitment of our many, many volunteers. Please consider volunteering for our organization in the future. I truly believe the rewards are far greater than the commitment of time.

I wish to extend a personal thank you to Laurie Hodge and Ashley Newton. Your dedication and professionalism, especially over the past few years, has been remarkable and has kept our association in good standing and moving forward. Thank you so much. I also want to extend a sincere thank you to my fellow Executive Committee Members: to Travis Lantz, Scott Powell, Karen Burnand, Mike Krim, Jeff McKinnon, Steve Toews and Carol Zukiwski, thank you ever so much for being so dedicated, wise and kind over the past year. Travis, I wish you the best of luck in your next year as President. I know you will be a wonderful President and Scott, my most sincere thanks on behalf of the association for your service as you now end your three-year commitment as Past President.

It has been a distinct pleasure to serve as your President over the past year. It is truly an honour to represent such an incredible group of professionals who perform such valuable work for the tax-payers, municipalities and people of Alberta. Our line of work is not often well-known or well-loved but it is important and it is noble. Thank you sincerely for allowing me this wonderful opportunity to serve you. I wish you, your colleagues and those you care about all the best in the future.

Respectfully submitted,

Daniel Lidgren, AMAA, AACI, P.App President, Alberta Assessors' Association



OUR VISION

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

OUR MISSION

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

- 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.
- Improve Financial stability by considering efficiencies to support the Association's sustainability.

OUR VALUES

INTEGRITY....acting with honesty and a high standard of moral principles

PROFESSIONALISM....a high level of industry (technical) skill, competence and character LEADERSHIP....the ability to inspire and move vision into reality

EXCELLENCE....superior performance delivered to our members and the public

Executive Committee	Ι	
	President	
Daniel Lidgren, AMAA		
Travis Lantz, AMAA	President-Elect	
Karen Burnand, AMAA	Vice-President	
Mike Krim, AMAA	Financial Director	
Scott Powell, AMAA	Past President	
Steven Toews, AMAA	Rural Director	
Jeff McKinnon, AMAA	Urban Director	
VACANT (formerly Shari LaPerle)	Public Member	
Carol Zukiwski, LLB	Parliamentarian	
Laurie Hodge	Executive Director/Registrar	
Nominating Committee		
Scott Powell, AMAA	Chair	
	Member	
Registration Committee		
Vanessa Powell, AMAA	Chair	
Tanya Plowman, AMAA	Member	
Becky Burke, AMAA	Member	
Kelly Gardiner, AMAA	Member	
Bozena Anderson, AMAA	Member	
Sue Pratte, AMAA	Member	
Tally Quaschnick, AMAA	Member	
Nathalie Thibeault, AMAA	Member	
Laurie Hodge	Registrar	
Daniel Lidgren, AMAA	Ex officio	
Examination Subcommittee		
Tanya Plowman, AMAA	Member	
Vanessa Powell, AMAA	Member	
Travis Howard, AMAA	Member	
Darren Nagy, AMAA	Member	
Renee Reddekopp, AMAA	Member	
Luis Delgado, AMAA	Member	
Shawna Robert, AMAA	Member	
Adam Martin, AMAA	Member	
Practice Review Committee	Wellbei	
Collin Hindman, AMAA	Chair	
Jerry Boutin, AMAA	Member	
Ben Matthews, AMAA	Member	
Zacharias Geib, AMAA	Member	
	Member	
Maureen Cleary, AMAA	Member	
Scott Pretty, AMAA Travis Lantz, AMAA	Ex officio	
Laurie Hodge	Registrar	

2021-2022 AAA Committee Volunteers

Discipline Committee	T	
Ron Van Dam, AMAA	Chair	
Jarrett Young, AMAA	Member	
Eddie Lee, AMAA	Member	
Rene Boutin, AMAA	Member	
Angel Svennes, AMAA	Member	
Vasily Kim, AMAA	Member	
Jessica Vanin, AMAA	Member	
Stephen Beveridge, AMAA	Member	
Steven Toews, AMAA	Ex Officio*	
Kevin Halsted, AMAA	Member	
Tyler Johnson, AMAA	Member	
*ex officio does not participate in investigations	or tribunals	
Legislative Policy Committee		
Mike Arnold, AMAA	Chair	
Kristine Haut, AMAA	Member	
Karac Hendriks-West, AMAA	Member	
Ann Burt, AMAA	Member	
Matthew Moore, AMAA	Member	
Michael Krieger, AMAA	Member	
Shanna McConnell, AMAA	Member	
Karen Burnand, AMAA	Ex officio	
VACANT (as needed)	EC Liaison	
VACANT (as needed)	EC Liaison	
Marketing, Communications and Public Relations (MCPR) Committee		
Melissa Zayac, AMAA	Chair	
Darren Davies, AMAA	Member	
Nicole Brasseur, AMAA	Member	
Tamara Ross, AMAA	Member	
Mark Trimble, AMAA	Member	
Christine Mau, AMAA	Member	
John Ermube, Candidate	Member	
Denise Ziegler-Handel, AMAA	Member	
Jeff McKinnon, AMAA	Ex officio	
Administrative Liaison		

HIGHLIGHTS

- ⇒ Membership revenues were down in 2021, mainly due to retirements and cancellations (and removal from the membership roll).
- ⇒ The Association applied for and received some offsetting federal Covid funding from the expanded CERS program.
- ⇒ Reserves remain intact at \$86,000, including an Operating Contingency.
- ⇒ Financial resiliency is entrenched in business planning.
- ⇒ The Association received final, full payment of one member's fine/costs from the 2019 court decision and 2020 cost awards.

Financial Review Summary

The Association's fiscal year runs from December 1 to November 30. Most revenues are earned in the period from March to August, through the collection of annual membership dues (including fees associated with application and accreditation processing). This revenue is then used throughout the year to cover expenses and is prorated at year end between prior and current year.

"Professional Development" includes Conference, Pre- Conference, Courses, Symposium and all related funds. Other revenues are sales of advertising (job postings), PAAH manuals, miscellaneous goods and services.

"Operations" is an "all in" category and includes salaries and generally the costs of administering an organization of the Association's size and scale.

"Committees" is inclusive of all committee expenses and is where Discipline costs are reported. Regulatory issues will continue to place significant pressure on the Association's budget until a sufficient reserve is in place.

AAA Revenues and Expenses

Revenue by Source Dec 1 - Nov 30	2020	2021
Membership Dues and Fees	\$227,467	\$211,434
Professional Development	\$ 12,925	\$ 64,213
Donations	\$10,000	\$0
Golf Tournament	\$0	\$0
Fines and Costs	\$2,750	\$ 21,127
All Other	\$7,552	\$ 19,958
TOTAL	\$260,694	\$316,732
Expenses by Category Dec 1 - Nov 30	2020	2021
Expenses by Category Dec 1 - Nov 30 Operations	2020 \$237,075	2021 \$231,825
Dec 1 - Nov 30		-
Dec 1 - Nov 30 Operations	\$237,075	\$231,825
Operations Committees	\$237,075 \$13,942	\$231,825 \$10,494
Operations Committees Professional Development	\$237,075 \$13,942 \$14,076	\$231,825 \$10,494 \$ 35,089
Operations Committees Professional Development Golf Tournament	\$237,075 \$13,942 \$14,076	\$231,825 \$10,494 \$ 35,089

The mandate of the committee consider membership is to applications to join the Alberta Assessors' Association and assist applicants working towards their AMAA designation. This includes grading and/or reviewing mandatory requirements of the accreditation process, including Demonstration Арpraisal Reports, Tools for Practicing Assessment in Alberta course and Oral Examinations.

Registration Committee Report

During the 2021-2022 term, the Registration Committee held seven teleconference meetings to consider applications from people wishing to join the Alberta Assessor's Association, process membership changes as requested by our members, and discuss questions raised by members or those pursuing their accreditation. The Registration Committee considered applications or membership changes as follows:

- 10 New Accredited members
- 10 New Candidates members
- 4 New Student members
- 7 Requests to move to AMAA Retired and
- 9 Membership Cancellations were acknowledged

The Registration Committee annually reviews its policies and establishes its schedule of meetings and Candidate Oral Examination dates. The committee recently reviewed its policies and application process to align with the recently changed Labour and Mobility Act. These new forms are available for use on the association's webpage. The Examination Subcommittee continued to hold oral exams virtually this year, conducting 12 examinations in total and reviewed 9 demonstration reports.

I want to thank all the Registration Committee members: Becky Burke; Kelly Gardiner; Bozena Anderson; Nathalie Thibeault; Sue Pratte; Tally Quaschnick; and, ex officio member President Daniel Lidgren for their dedication and contributions to this committee and the Association. I would also like to thank the members that formed our Examination Subcommittee: Tanya Plowman (chair); Travis Howard; Darren Nagy; Renée Redekopp; Shawna Robert; Luis Delgado; and Adam Martin. As always, a big thank you to our Administration team for their commitment and hard work that ensures our committee ran smoothly.

Respectfully submitted,

Vanessa Powell AMAA Chair, Registration Committee

	2016	2017	2018	2019	2020	2021
	2016	2017	2010	2019	2020	2021
Accredited	319	315	314	313	324	321
Candidate	192	210	209	212	213	210
Associate	33	31	31	30	26	26
Retired	68	64	71	75	80	73
Student	16	19	22	24	24	28
Life	6	6	6	6	6	4
MPTA	2	18	28	29*	0	0
Other	8	5	5	3	2	2
Total	644	668	686	689	675	665

The mandate of the committee is to evaluate/develop educational standards for the membership, evaluate desirable standards of competence for the practice of the membership, promote the development of continuing education programs for the membership, and advise on the practice of assessment in general.

HIGHLIGHTS

- ⇒ 188 attended 2021 online conference
- ⇒ Fundamentals of Residential Assessment first offered in December 2021
- ⇒ Collaboration with RMRF on a webinar panel discussion of the CNRL decision.

Practice Review Committee Report

2021 was both a challenging and successful year for the Alberta Assessors' Association and the Practice Review Committee. The switch to a fully online conference and pre-conference in April of 2021 was a great success. Close to 200 members "virtually" attended our 2021 conference with thanks to Karen Burnand for hosting the event from the Production World facility. The PRC is thankful of members embracing online learning and supporting the Association while achieving recertification credits.

The PRC and our members were excited for an in-person Fall 2021 Education Symposium and the committee was busy through the fall and late summer planning our educational offerings. Unfortunately, due to the fourth wave of COVID-19, we had to cancel the fall symposium as it wasn't feasible to pivot to an online format at the last minute. With the cancellation of the Fall Symposium, the PRC was able to carry forward planning successes and programming to the 2022 conference in Banff.

In addition to planning a portion of the programming for conference and symposium I'm happy to say the association offered a Fundamentals of Residential Assessment course created by Wayne Kelly. The AAA sponsored a webinar where the merits of the recent CNRL decision were discussed featuring legal counsel and one of the witnesses involved. The Association also continues to offer the online tools course.

The PRC thanks all members, presenters, and participants over the last year that contributed to the availability of education opportunities.

As the Chair of PRC, I would like to thank the Committee: Maureen Cleary, Stephen Bannerman, Jerry Boutin, Ben Matthews, Zach Geib, Scott Pretty and Travis Lantz (ex-officio). A very big thank you to Laurie Hodge and Ashley Newton for their support and perseverance through constant change.

Respectfully Submitted,

Collin Hindman, AMAA Chair, Practice Review Committee

The mandate of the Discipline Committee is to investigate and/ or review complaints submitted on the professional conduct of any regulated member of the Alberta Assessors' Association. The review of complaints against regulated members will be in accordance with the provisions of the Professional and Occupational Associations Registration Act (POARA) and the Municipal Assessor Regulation under the Act.

The Discipline Committee also conducts its meetings and investigations as noted in this Policy.

	Complaint	Dismissal
2017	2	2
2018	1	1
2019	2	1
2020	2	2
2021	0	0

Complaints are referred for Investigation by the Chair who then makes a determination to dismiss or refer to a disciplinary tribunal. A dismissal by the Chair may be appealed to the Executive Committee.

Discipline Committee

I am pleased to provide the 2021/2022 Discipline Committee report.

The Chair is responsible for reviewing submitted complaints to determine whether there is merit to continue to a hearing or not. As Chair, of the Discipline Committee, I reviewed one complaint in 2021-2022. It was sent back to appellant for more information and is currently on hold. There are currently no other cases in the queue for a review.

I would like to thank the members of the committee for their commitment to helping the Association assure that the professional conduct of all regulated members is held at a high level in accordance with the Professional and Occupational Associations Registration Act and the Municipal Assessor Regulation.

I would like to thank the following members who were part of the committee for 2021-2022. Angel Svennes, Jessica Vanin, Rene Boutin, Tracy Ryan, Jarrett Young, Vasily Kim, Tyler Johnson, Kevin Halsted, Eddie Lee and Steven Beveridge and our ex officio member, Steven Toews.

On behalf of the Committee, I would like to thank Laurie Hodge and the Executive Committee for the assistance this past year.

Respectfully submitted,

Ron Van Dam, AMAA Chair, Discipline Committee

The mandate of the Legislative Policy Committee is to prepare position documents on legislative and government policy issues affecting the practice of assessment. The position documents must reflect the Alberta Assessor's Association's guiding principles, as amended from time to time by approval of the membership.

Legislative Policy Committee

The primary focus of the Legislative Policy Committee is to define the Association's position on specific topics and emerging issues, examining these with an eye to our partner organizations, and respond on behalf of the Association through the Executive Committee regarding legislation and policy changes coming from the Provincial Government.

The LPC met on June 10, 2021 regarding proposed changes to the Minister's Quality & Reporting and Recording Guidelines that the Provincial Government had put forward for review. This meeting had a two-fold purpose; firstly to gather more information from Municipal Affairs to give context to the changes being proposed; and, secondly, to consolidate the Association's position and response to the changes. The Urban Director attended the second half of the meeting as a representative of the City Assessors' Group (CAG) to co-ordinate the AAA response with that of CAG. A formal report & response to the changes was submitted to Municipal Affairs following approval by the Executive Committee.

In September, LPC reconnected to draft the Association's response to proposed changes to the Review of Exchange of Assessment Information guideline document from Municipal Affairs.

The changes proposed were extensive, so the Committee split up the document into sections for each member to review and write up a responsehe Committee members drafted responses to their sections and sent them in to be consolidated by the Executive Director. The consolidated response was then forwarded to Executive Committee for approval, then submitted to Municipal Affairs.

In November LPC again met to review proposed legislative changes to the Red Tape Reduction Act. There were 11 points / changes being proposed. Most notably, to remove "designated officer" from the position of municipal assessor in the MGA; another proposed change was for legislation be amended so that property specific ARB decisions would be carried forward to subsequent years' assessments (the Committee was solidly opposed to these two). Due to the tight time frame provided to respond, the individual members wrote up their remarks on the 11 points and submitted them to the Executive Director.

I would like to take this opportunity to thank committee members Kristine Haut, Karac Hendriks-West, Michael Krieger, Matthew Moore, Anne Burt, Shanna McConnell, and our Ex-Officio Karen Burnand. The LPC members consistently showed great commitment to enhancing the profession and practice of assessment throughout the year, and under constrained timelines. I would also like to thank Laurie Hodge for all her hard work with the committee, as well as Karen Burnand who kept our committee up to date with directives from the Executive Committee throughout the year.

Respectfully Submitted,

Michael W. Arnold, AMAA Chair, Legislative Policy Committee

The Marketing, Communications and Public Relations Committee proposes, develops and reviews strategies and activities that raise awareness of the Association, the AMAA designation, and the Assessment and Taxation professions; ensures the on-going positive relations with internal and external stakeholders; creates and monitors advertising and promotional material; and monitors all print and digital media about and for the Association.

Marketing, Communications and Public Relations (MCPR) Committee

For the 2021-2022 term, the MCPR Committee did not hold any meetings. Amid the global pandemic and the provincial restrictions, the majority of the committee work was held over as much of the information and development of the AAA logo and website redesign was completed and rolled out to the membership and public.

Committee operational needs were still functioning with focus on conference materials as it was held virtually.

There were a total of 2 eclips distributed to the membership during this term. Currently, the committee is exploring ways to potentially have future editions of the eclip accessed fully digital with the utilization of new templates, as well with sending them quarterly as content permits.

The development of promotional materials and information is an ongoing process with MCPR Committee where new promotional items will include the new AAA logo with the intent to have the items available for purchase by the membership.

Thank you to all our committee members during this term, namely; Darren Davies, Nicole Brasseur, Christine Mau, Denise Zeigler-Handel, Jamie Clark, Jeff McKinnon, Mark Trimble, and John Ermube.

Another acknowledgement to Laurie Hodge and Ashley Newton for their ongoing assistance to keeping the committee organized, and their valuable dedication throughout the year.

Respectfully Submitted,

Melissa Zayac, AMAA Chair, Marketing, Communications and Public Relations Committee

2021-2022 NEWLY ACCREDITED MEMBERS



Jenna Brown, AMAA City of Grande Prairie





Robyn Ferguson, AMAA MNP LLP

Brandon Garner, AMAA Benchmark Assessment





Natalia Tikhonova, AMAA City of Edmonton

Konstantin Tikhonov, AMAA City of Edmonton



2021-2022 NEWLY ACCREDITED MEMBERS



Jessica Wong, AMAA City of Calgary





Brett Thompson, AMAA
City of Calgary



These professionals, having complied with the requirements of the Municipal Assessor Regulation under the Professional and Occupational Associations Registration Act and having demonstrated to the Registration Committee a record of education, experience, and other qualifications to satisfy the conditions established by the Alberta Assessors' Association, are granted the right to use the title "Accredited Municipal Assessor of Alberta" with all privileges, honours and obligations as proof of credentials for the performance of assessment duties in Alberta and the Territories of Canada.

30 Years

Clark Dennis, AMAA



Career Began With: Compass Assessment

Currently Working For:Regional Municipality of Wood Buffalo

Career Hightlight:
Being recommended for my current role by a long serving industry mentor..

Calvin Bespalko, AMAA



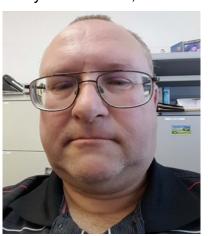
Career Began With: MD of Rocky View

Currently Working For: MD of Bonnyville

Career Hightlight:

Being in Fort McMurray before and during the boom years and implementing annual assessments at market value.

Raymond Crews, AMAA



Career Began With: Alberta Municipal Affairs

Currently Working For: Municipal Assessment Services

Career Hightlight:

With Ian and Dan, forming our own company

30 Years

Dennis Debuschere, AMAA



Career Began With: City of Grande Prairie

Currently Working For: Cenorvus Energy

Career Hightlight:Switching from municipal to private assessment.

Luc Mercier, AMAA



Career Began With:SAMA (SK Assessment Management Agency

Currently Working For: MD of Yellowhead



Also celebrating 30 years' of professional practice:

Stewart Dalrymple, AMAA Marty Carpentier, AMAA

40 Years

Stephen Washington, AMAA



Career Began With:

Municipal Affairs in Red Deer

Currently Working For:

Retired in 2021 from Wild Rose Assessment

Career Highlight:

Accreditation from AAA, AAA Urban Director, Vice Chairman CPTA (West) and Partner in Wild Rose Assessment

John Lindsay, AMAA



Career Began With:

The City of Calgary

Currently Working For:

The City of Red Deer

Career Highlight:

The opportunity to serve numerous years with our industry's professional board and committees (Alberta Assessors' Association and the International Association of Assessing Officers). Those times were filled with great learning opportunities, friendship building and a lot of fun.

Victor Koluk, AMAA



Career Began With:

Municipal Affairs in Medicine Hat

Currently Working For:

MD of Bonnyville

Career Highlight:

The 40 years of being an Assessor have been great. I would recommend this career to anyone. Everyday has been a highlight and I hope to put in a few more years yet.

40 Years

Andre Guilbault, AMAA



Career Began With:

Municipal Affairs in Wainwright in 1982

Currently Working For:

Part owner of Wainwright Assessment Group Ltd.. Where I am the appointed assessor for the MI.D. of Wainwright and M.D. of Provost.

Career Highlight:

Obtaining my AMAA designation and now reflecting on past 40 years leading up to this recognition.

Rob Matiko, AMAA



Career Began With:

Municipal Affairs in Peace River

Currently Working For:

TAQA North Ltd.

Career Highlight:

Being part of the implementation of the new assessment rates for cable television

Orest Golinowski, AMAA



Career Began With:

Wainwright Assessment

Currently Working For:

Beaver County

Career Highlight:

Turned the big 60 year age-life factor with an effective 40 years' service

2022 LONG SERVICE RECOGNITION 40 Years



Also celebrating 40 years' of professional practice:

Doug Smith, AMAA Doug McLennan, AMAA