

Department business plan update

Assessment and Tax

Department overview

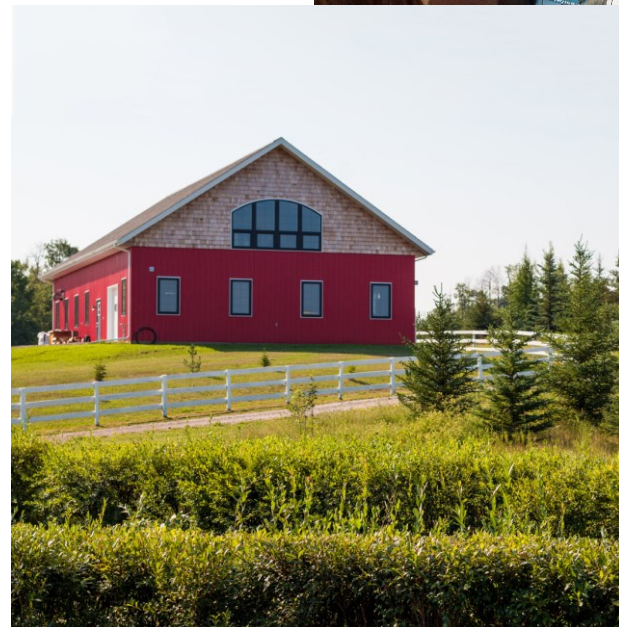
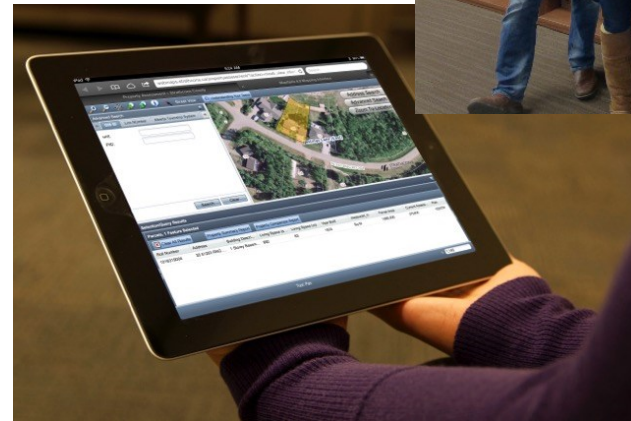
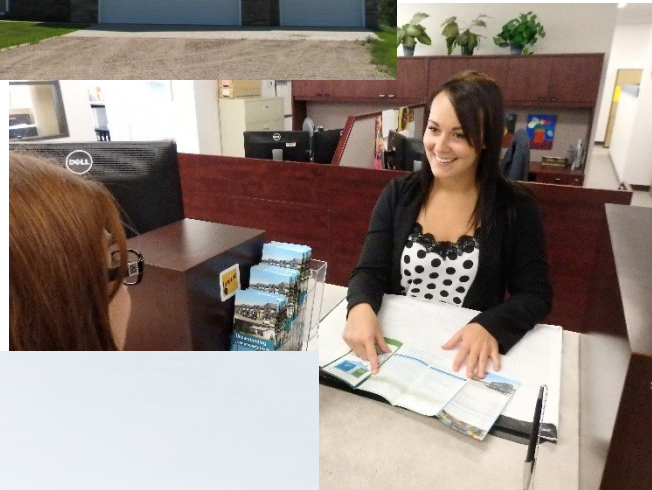
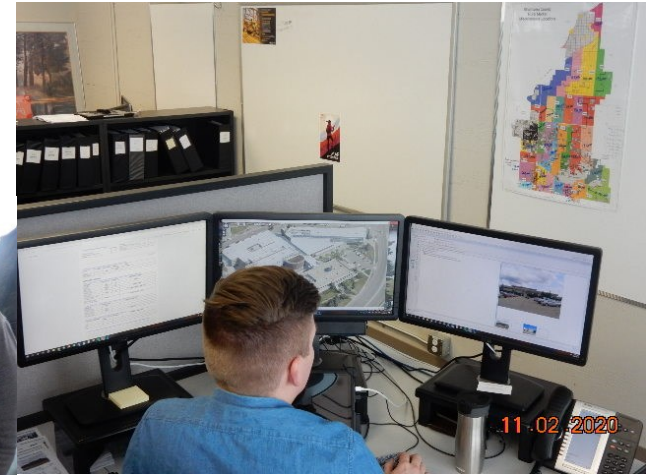
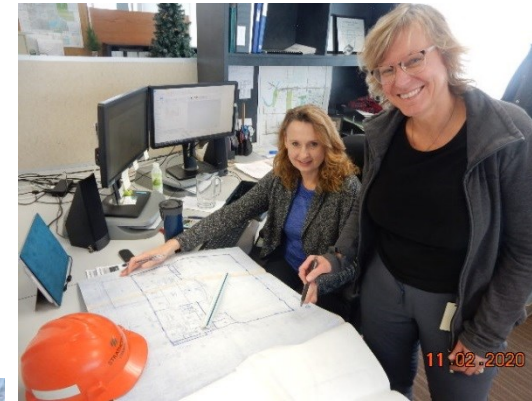
The Assessment and Tax Department annually prepares and communicates a legislatively compliant assessment and tax roll that provides for the equitable distribution and collection of property taxes amongst residents, business and industry.

Our team prepares property assessments for one of the largest and most complex assessment bases in the province. As a specialized municipality, Strathcona County is unique in terms of the significant scope of urban and rural properties combined with a large petrochemical industry. The municipality is made up of:

- 45,000 total properties
- 43,000 taxable properties
 - 39,000 residential and farmland properties
 - 2,000 commercial/industrial properties
 - 500 Designated Industrial Properties (DIP)
 - 1,500 miscellaneous properties
- \$35 Billion Assessment base

Property taxes are the primary funding source allowing Strathcona County to deliver services and maintain infrastructure.

Department overview



Core business functions

Assessment

- Property Valuation
- Assessment Roll Maintenance
- Assessment and Tax Notices
- Assessment Reporting
- Assessment Complaints/Hearings

Taxation

- Automated Tax Payment
- Cashier Service
- Fee-for-Tax Information
- Tax Recovery

Progress on core function forecast

Baseline Measures (2019 tax year):

Assessment function:

- 10,000 property inspections/reviews (4,000 building permits, 6,000 reviews)
- 400 County Connect cases
- 40 Assessment Review Board complaints (6 residential, 34 commercial/industrial)
- 3,500 Certificate of Title changes (1,750 property sales)
- 400 new assessable properties
- 43,000 recalibrated market values (residential, commercial/industrial)
- 2,000 recalibrated regulated values (farmland, linear, Machinery and Equipment)

Taxation function:

- \$302 million dollar tax levy (\$217 million municipal tax)
- 96.5% taxes collected by June deadline
- 43,000 taxable properties
- 17,400 properties on monthly payment program (TIPP)
- 175 tax recovery files, in process
- 5,700 fee-for-service transactions (lawyers, financial institutions)
- Cashier Service (tax payments, utility payments, dog licenses etc.)
- 45 County Connect cases

Progress on core function forecast

Assessment function:

- **GIS oblique imagery integration and automated Request for Information tool** has created data collection process efficiencies and improved customer service (increased response rates, improved data quality, less intrusive, reduced on-site inspections)
- **Valuation modeling accuracy** through highly qualified staff, best practices and leveraging technology (accreditation and training, department structure, GIS-Tablet technology, valuation analytics)
- **Assessment Review Board management** through accurate assessment valuations and a pre-roll consultation process has stabilized the number of ARB complaints and hearings

Progress on core function forecast

Assessment function (continued):

- **Customer service**, including the 'Assessment Mapping Tool and the 'Tax Calculator Tool' (85,000 webpage views, 45,000 annual Assessment and Tax notices/brochures, over 10,000 customer interactions per year)
- **External stakeholder engagement and advocacy** (including provincial policy change, AUMA/RMA resolutions, committee representation)
- **Internal stakeholder engagement and reporting** (including assessment growth, valuation trends, tax rate bylaw, corporate policy)

Progress continued

Taxation function:

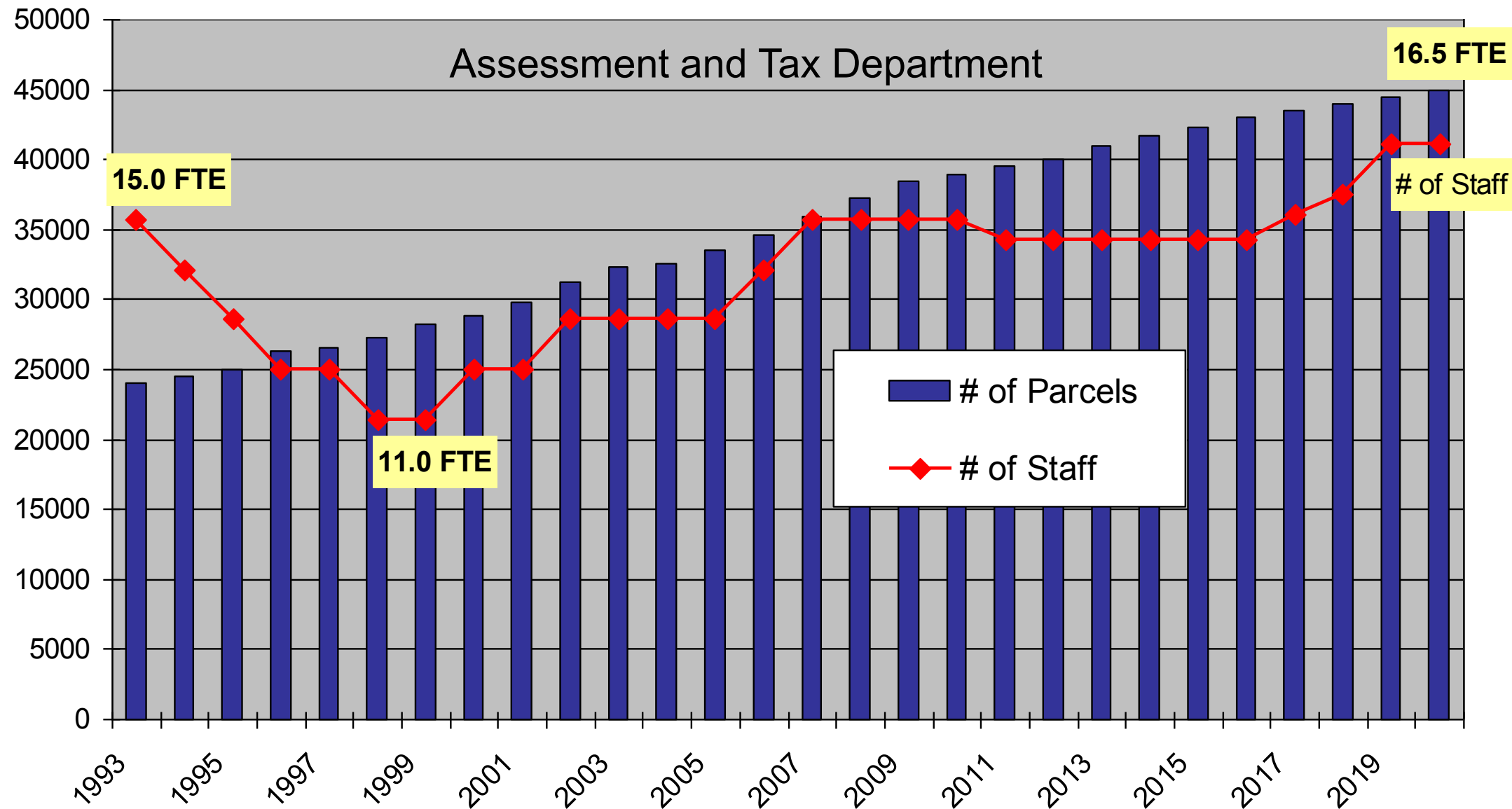
- **Tax Instalment Payment Plan** (promotion of program and effective application process)
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- **Self-serve web portal - 'fee-for-service'** (improved customer service, online tax certificate purchases and citizen portal for account inquiries)
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- **Tax recovery file management** (arrears reminder notices, tiered penalty structure)

Progress continued

Taxation function (continued):

- **Centralized cashier service** (County Hall restack project, improved customer service, increased safety and security)
- **Strathcona County Business Transformation** (ERP for taxation module in scope – improved system integration, reporting, analytics to support informed decision making)

Progress continued



Employee engagement

| Engagement survey theme | Engagement initiative | People Plan focus area |
|--------------------------|---|--|
| Leadership | Consistency and Fairness, Open lines of Communication, Business Plan linkages | Leadership, Clear Purpose, Accountability, Trust |
| Acknowledge Achievements | Celebrate success, Performance Planning Review (PPR) discussions | Positivity, Leadership, Team |
| Succession Planning | Mentorship opportunities, learning and development, career growth | Trust, Leadership |
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Initiatives

No current initiatives, in the next multi-year budget cycle, that have operating or capital budget implications.

Questions?

