



2020 - 2023
DEPARTMENT
BUSINESS PLAN
Assessment and
Tax

Date of last revision
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MESSAGE FROM THE DIRECTOR



I am pleased to present the 2020 - 2023 business plan for the Assessment and Tax Department. Each year we produce an assessment and tax roll that meets legislative requirements for accuracy and timeliness and is effectively communicated to our residents, businesses, and industry. This supports the Corporate business plan in terms of financial sustainability, collaborative governance, and informed citizens.

We focus on our customers by providing current and accurate assessments combined with efficient and effective tax collection services.

The next four years will present challenges involving property growth and legislative change, all within one of the largest and most complex assessment bases in the province. Our business plan includes three goals, which will help the department successfully meet these challenges:

1. Ensure we meet legislative and audit standards to provide valuation accuracy and tax equity for property owners.
2. Leverage technology and best practice to allow for efficient and cost-effective service delivery.
3. Support informed decisions on both corporate and intragovernmental policies, procedures and outcomes.

Property tax stability, competitiveness, fairness and equity are all important factors towards supporting corporate strategic and organizational excellence goals.

Wayne Minke

Director, Assessment and Tax

PLANNING FOUNDATION

STRATHCONA COUNTY VISION

Living in Strathcona County

Strathcona County, located in the heart of Alberta, is an energetic and thriving community. A leader in North America’s petroleum industry and a champion for advancing diverse agricultural business, we use our energy to power our new tomorrow.

We are a specialized municipality, and work cooperatively with our urban and rural residents to govern as a single municipality. Proud of our distinct governance model, we promote and demonstrate our achievements.

We are a welcoming place to live and attract people of all ages, cultures and walks of life to join us. Families thrive in our dynamic, caring and safe community.

We strive to be a model of ecological integrity, protecting our environment and preserving our agricultural heritage.

Investment in infrastructure, quality services, cultural and recreational programs, and facilities is a priority and sets us apart.

Becoming Canada’s most livable community

CORPORATE MISSION

We are committed to working collaboratively, efficiently and effectively to provide quality service delivery to citizens, business, and industry alike.

CORPORATE VALUES

Our values help to form our organizational identity and define our culture.

Integrity	We demonstrate ethical standards and behaviours We display honest behaviour at all times We do what we say we will do
Respect	We treat others with care and dignity We pay attention to each other We welcome a variety and diversity of ideas
Safety	We consistently demonstrate safe work practices We build an environment of openness and trust We make it safe for each other to voice opinions or concerns
Fairness	We consider how our actions might affect others We treat everyone impartially and equitably We are willing to share the reasoning behind our thinking and decisions
Cooperation	We support, assist and learn from each other We give credit to others for their contributions We compromise when needed to achieve common goals

DEPARTMENT MISSION STATEMENT

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

DEPARTMENT OVERVIEW

The Assessment and Tax Department 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
- 42,000 taxable properties
- 37,000 residential properties
- 1,800 commercial-industrial properties
- 800 Designated Industrial Properties (DIP)

Our two core functions, property assessment and property taxation, are governed by the Municipal Government Act and associated regulations.

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

DEPARTMENT CORE BUSINESS FUNCTIONS AND PROGRAMS

ASSESSMENT

Property assessment is the process of valuing property for taxation purposes. This consists of the following Priority Based Budget programs:

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

2020 – 2023 FORECAST

Resource demands are expected to continue:

- Property growth
- Valuation complexity
- Legislative change
- Assessment Review Board and Municipal Government Board

TAXATION

Taxation is the process of multiplying a property assessment by a tax rate(s), to determine that property's proportional share of tax each year. This consists of the following Priority Based Budget programs:

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

2020 – 2023 FORECAST

Resource demands are expected to continue:

- Property growth
- Business Transformation project
- Tax Recovery growth

DEPARTMENT ANNUAL CAPITAL IMPROVEMENTS

DEPARTMENT SUPPORT ROLES (ANNUAL CAPITAL INITIATIVES)

This table illustrates the initiatives that this department will be expected to support during the 2020 – 2023 Business Plan timeline. Lead departments are responsible for providing clear plans to support departments. These plans are to advise support departments on particulars of the support required and timing.

INIT/AUTO #	Annual Capital initiative	Description	Department lead	Timeframe
AUTO 1309 1310 1311 1312 1313	Annual Information Technology Corporate Infrastructure Replacement Program - Municipal	To support computer and technology infrastructure components remain current and able to deliver on services and reduce risk of service interruptions.	Information Technology Services	Ongoing
AUTO 1284 1285 1286 1287 1288	Annual Facility Capital Lifecycle Program	To maintain safe, functioning and operating County facilities.	Facility Services	Q1 2019 - ongoing

DEPARTMENT IMPROVEMENT INITIATIVES

DEPARTMENT SUPPORT ROLES (IMPROVEMENT INITIATIVES)

This table illustrates the initiatives that this department will be expected to support during the 2020 – 2023 Business Plan timeline. Lead departments are responsible for providing clear plans to support departments. These plans are to advise support departments on particulars of the support required and timing.

INIT/AUTO #	Improvement initiative	Description	Department lead	Timeframe
AUTO 1003	Strathcona County Business Transformation (SCBT) Program	To transform and align people, process and technology in four of the County's core Business functions of finance, human resources, procurement and contract management. Included in process and technology are utility billing and property tax. Included in technology is corporate asset management.	SCBT Project Team	Q3 2017 – Q3 2020
INIT 90	Enterprise Strategic Portfolios Implementation	To operationalize enterprise strategic portfolios to ensure corporate -wide management oversight and decision making accountability.	Corporate Planning	Q2 2018 – Q4 2021
INIT 89	Performance Measurement Maturity Improvements and Service Level Review	To improve the County's performance measurement maturity and to review service levels.	Corporate Planning	Q1 2019 – Q4 2022
AUTO 1828	County Hall Main Floor Restacking - Phase II	To bring the building up to current building code / standards and to consolidate public counters.	Facility Services	Q1 2019 – Q1 2021
INIT 66	New Occupational Health and Safety (OHS) Legislation Implementation	To be fully compliant with the new OHS legislation coming into effect June 1, 2018.	Human Resources	Q1 2019 – Q1 2023
INIT 30	Digital Workplace Program	To establish a single, integrated, modern electronic content and collaboration technology platform that will replace several isolated software applications that exist today.	Information Technology Services	Q1 2019 – Q4 2021

INIT/ AUTO #	Improvement initiative	Description	Department lead	Timeframe
INIT 86	Corporate Inclusion and Diversity Training	To develop staff skills and knowledge to help create and maintain an inclusive work environment and promote inclusion within the community through citizen interactions	Human Resources and Intergovernmen tal Affairs	Q1 2019 – Q4 2022
AUTO 1823	OHS / Disability Management Technology Project	To create a digital workflow system to address information on the County's OHS and DM areas.	Human Resources	Q2 2019 – Q1 2021
INIT 63	Succession Planning Strategy	To develop a succession planning strategy	Human Resources	Q3 2019 – Q4 2022
INIT 38	Corporate Approach to Credit Card System and Payment Options	To complete a comprehensive review of the different payment options offered to customers in various Departments.	Corporate Finance	Q2 2020 – Q4 2020
INIT 14	Enterprise Risk Management Program	To develop an enterprise risk management program.	Corporate Finance	Q1 2020 – Q4 2022
INIT 8	Business Expense Policy Review and Update	To review and update the Employee Business Expense Policy.	Corporate Finance	Q1 2021 – Q3 2021
INIT 26	Enterprise - Wide Communications Review	To conduct an enterprise - wide review of communications services.	Communication	Q1 2021 – Q4 2021
INIT 32	Program Based Budgeting and Reporting Framework	To develop and / or transition to a program based budgeting framework.	Corporate Planning	Q3 2021 – Q4 2023
INIT 104	Municipal Emergency Management and Business Continuity Management Systems Integration	To properly interconnect and update department business continuity and municipal emergency response plans.	Emergency Services	Q1 2021 - ongoing

APPENDIX 1: STRATHCONA COUNTY GOALS AND RESULTS

STRATEGIC GOALS (EXTERNAL COMMUNITY FACING)

Goal 1: Build strong communities to support the diverse needs of residents

- Opportunities for meaningful connections within communities Diverse and inclusive communities
- Appropriate access to the social service system through partnerships Affordable basic municipal services
- Programming meets the changing needs of residents
- Opportunities to be healthy and active

Goal 2: Manage, invest and plan for sustainable municipal infrastructure

- Efficient and effective multi-modal transportation network
- Safe, reliable utility infrastructure
- Innovative “smart” infrastructure
- Accessible cultural, recreational and social infrastructure
- Accessible, reliable internet connectivity
- Partnerships enhance infrastructure investment opportunities

Goal 3: Cultivate economic diversification, within the petro-chemical industry and beyond, through a business-friendly environment

- Strategic partnerships promote business growth and retention
- Planning supports strategic development
- Critical physical and technology infrastructure supports business, industry, and agriculture Investment attraction and retention focus on downstream, value-added industry
- Strengths and innovation provide a competitive advantage, and support attraction and diversification
- Growth opportunities increase through regional brand and economic development strategies

Goal 4: Ensure effective stewardship of water, land, air and energy resources

- Appropriate and effective use of agricultural land
- Natural areas and resources balance value for current and future generations
- Municipal buildings deploy efficient technology where appropriate
- Growth and development balanced with recognition and protection of the biosphere (Beaver Hills)
- County uses best practice approach to waste management

Goal 5: Foster collaboration through regional, community and governmental partnerships

- Improved regional land use and resource management planning
- Regional assets leveraged for mutual benefit
- Innovation and lifelong learning opportunities occur through collaboration with educational institutions
- Community partnerships leveraged to expand the County's ability to respond to the changing needs of the community

Goal 6: Provide facilities and services that are available and accessible to residents

- Connected, accessible multi-modal transportation network, including trails
- Available, accessible and affordable recreational opportunities
- Diverse, affordable neighbourhoods, amenities and housing opportunities
- Enhanced community interaction and connectedness
- Accessible community and cultural events, entertainment, shopping and dining opportunities

Goal 7: Provide opportunities for public engagement and communication

- Community is informed about County decisions
- Community – urban and rural – satisfied with opportunities to provide input
- Community is confident in how tax dollars are managed
- Public engagement efforts and information sharing mechanisms are innovative and accessible

Goal 8: Foster an environment for safe communities

- Law enforcement, emergency and social services respond to community risk
- Proactive safety education and community involvement
- Utility infrastructure provides safe, clean water, manages wastewater treatment, and provides effective storm-water management
- Citizens feel safe to express themselves in ways that represent their values, beliefs, and lifestyles
- Transportation network, including trails, allows people and goods to move safely and efficiently

CORPORATE ORGANIZATIONAL EXCELLENCE GOAL (INTERNAL FACING)

Goal 9: Continuously improving the way we work, as one organization, in an agile and sustainable manner

- Collaborates with regional, community and government partners
- Integrates information and technology
- Supports long term financial sustainability
- Supports infrastructure management
- Supports workplace culture that builds trust and promotes employee contribution
- Supports development of employee capacity through training and development
- Supports insight-driven/evidence-based decision making
- Supports continuous improvement
- Ensures compliance with regulations, laws, procedures and policies
- Supports integrated planning
- Leverages tools (i.e. technology, equipment) to assist in service delivery
- Engages stakeholders in decision making
- Communicates to stakeholders about County programs and services
- Collaborates with departments