



THE CITY OF WINNIPEG

ATTACHMENT B: RFP USE CASES

RFP NO. 486-2023

COMPUTER ASSISTED MASS APPRAISAL (CAMA) SOLUTION

Table of Content

1A: Parcel Maintenance – Mapping / Ownership	3
1B: Parcel Maintenance – Data Collection / New Construction / Building Permit	5
1C: Parcel Maintenance - Income & Expense Data Collection	22
1D: Parcel Maintenance – Sales Data	25
2A: Parcel Valuation – Multiple Regression Analysis (MRA) / Market	28
2B: Parcel Valuation – Income	30
2C: Parcel Valuation – Cost	32
2D: Parcel Valuation – Land Valuation	34
3: Personal Property	36
4: Business Valuation	53
5A: Appeals - Board of Revision (BOR)	56
5B: Appeals - Municipal Board	59
6: Reporting and Querying	62

1A: Parcel Maintenance – Mapping / Ownership

Use Case 1A: Parcel Maintenance – Mapping / Ownership	
BUSINESS SERVICE	Parcel Maintenance – Mapping / Ownership
DESCRIPTION	Replot process (parcel split or combination) integration with the Land Titles Office (LTO) and Planning Property & Development Office (PPD) to initiate workflow-driven mapping, highlighting the audit trail feature, copy function, and document management for before-and-after visualization.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • To create and map new roll numbers (PIDs), make changes to PID information & ensure up to date information of the assessment parcel and the assessment roll. • To create new roll numbers for parcels that have not been previously assessed • Archive assessment parcels in the mapping and the CAMA system(s) • Maintain an audit trail in the CAMA system
USE CASE	<p>Process 4 examples of a replot. A) a simple parcel merge; B) a subdivision split; C) a division of a developed parcel from one parcel to two; D) a condominium (strata) multi-suite building that has individual PIDs for each unit. We anticipate that you will use a current client or test database to show this functionality. Note that the City of Winnipeg Assessment Department is responsible for managing the parcel layer mapping for this process.</p> <p>A) Demonstrate in a current client or test database how your system will merge two parcels of land into one parcel identification number (PID). This includes demonstrating the mapping changes, retirement of at least one of the original parcels and the copy of characteristics into the new assessment parcel.</p> <p>B) Demonstrate in a current client or test database how your system will split one parcel of land from one PID into many parcels. This includes demonstrating the mapping and creation of the characteristics of the new assessment parcels. The ability to showcase a copy function (or similar) so parcel and building data does not need to be re-entered is ideal in this scenario.</p> <p>C) Demonstrate in a current client or test database how your system will split one developed PID (currently with a 2 commercial buildings) into two separate PIDs, each with one of the buildings, this includes demonstrating the mapping and the creation of the characteristics of the new assessment parcels. The ability to showcase a copy function (or similar) so parcel and building data does not need to be re-entered is ideal in this scenario.</p> <p>D) Demonstrate in a current client or test database how your system subdivides a multifamily building into condominiums (also known as strata) parcels. Use of a building with four (4) or more units is preferable. The ability to showcase a copy function (or similar) so data</p>

	<p>does not need to be re-entered for each of the four (4) units is ideal in this scenario.</p> <p>Critical Steps:</p> <p>Process Inputs:</p> <ul style="list-style-type: none"> • Receive Titles from Winnipeg Land Titles Office (WLTO) • Receive Plans of Legal Subdivision from PPD • Receive Leases from PPD • Titles and plans are received from WLTO and PPD • New roll numbers (PIDs) with property identifiers such as address, legal description and title information are assigned in the CAMA system • New roll numbers (PIDs) are mapped, and the mapping layer reflects changes • Update characteristics (parcel size, attributes, etc.) and balance the current assessments (distribute the current value of the original PID(s) to the new PIDs), classification and liability for tax purposes • Update sales data in CAMA system • Ensure mapping illustrates final values and correct characteristics • Update and finalize assessed values in CAMA system
<p>EXPECTED OUTCOME</p>	<ul style="list-style-type: none"> • Complete the subdivision or merge process for the four described scenarios • Show the use of workflow to manage the replot process. • Show old parcel and new parcel data using the parcel audit trail (history/tracking) function. • Show system copy functionality when moving data from one parcel to another (as needed) • Show parcel updates in GIS. <ul style="list-style-type: none"> ○ If you can show the actual parcel editing, please do. • Show the registered owner of the real estate has been updated. • Show how documents are saved/accessible that are related to this process. • Show the final assessed values for the new PIDs • Show the ability or explain how the solution would create new roll number from a parcel that was not previously assessed (is not part of a merge or a split of an existing roll number)

1B: Parcel Maintenance – Data Collection / New Construction / Building Permit

Use Case 1B: Parcel Maintenance – Data Collection / New Construction / Building Permit	
BUSINESS SERVICE	Parcel Maintenance – Data Collection / New Construction / Building Permit
DESCRIPTION	<p>Field Collection: Collect data in the field using either a paper or electronic device. This process can include parcel updates due to building permits, sales, appeals or other data collection initiation activities. The end of the data collection process may provide updated values where appropriate and showcase the ability to show a value estimate without saving to the current roll (roll estimate or “what-if” analysis).</p> <p>Desktop Collection: Manage desktop data collection with aerial photography and/or street level images. Show CAMA system functionality, project setup, and tracking of changes for neighborhoods or work projects.</p>
KEY BUSINESS GOALS	<ul style="list-style-type: none"> To collect property data for assessment purposes (both in the field and at the desktop). Finish work on all residential permits within 12 months of when the permit is completed. Finish work on all commercial/industrial permits within 18 months from initial occupancy. To track and ensure data collection is both accurate and consistent.
USE CASE	<p>Any of the following reasons could initiate a property review</p> <ul style="list-style-type: none"> Reassessment Appeal Revision Replot Sales Other <p>A) Demonstrate how to collect and record available characteristic information while on site including any sketch updates and completing any outstanding sales verification (either a commercial or residential structure).</p> <p>B) Demonstrate how to review data and enter into CAMA or sync data from field data collection device.</p>

- C) Demonstrate how to upload any documents or photographs collected as part of the inspection into the Document Management system (DM).
- D) Demonstrate how to process assessment changes and create any necessary Adjustments to Roll (ATR). These adjustments typically create notices that are sent by mail to the property/business owner.
- E) Demonstrate how you approve adjustments sent to Data Services (final valuation process) for processing and notice creation.
- F) Demonstrate how you would data-collect a multi-classed parcel. Show how this multi-classed application is applied to the valuation and ultimately to the assessment roll.
- G) Demonstrate how you generate and assemble necessary information for property inspection. This could include:
 - a. Field Forms or Property Record Card (PRC). This could be printed or field data collection device.
 - b. Open permits or inquiries (311)
 - c. Sales Information for Verification (as needed)
 - d. Pertinent MLS data
 - e. Title and/or company searches
 - f. I&E mailers and sales mailers (as needed)
 - g. Business Assessment information
 - h. Maps, photos, etc.
- H) Demonstrate how you would collect data using a desktop data collection methodology
 - a. Demonstrate how you would create a project for desktop data collection or data review.
- I) Demonstrate how the data collection process uses workflow to assign, track and update the system as the various components of the data collection are completed.

We anticipate that you will use a current client or test database to show the requested functionality. In addition, we have provided anonymous data in order that you have an understanding of the depth and breadth of data the City of Winnipeg is currently working with.

The data include (please see below this use case):

Commercial property details with multiple property classes.

- [UseCase1BData](#)

Residential property details.

- [UseCase1BResidential](#)

	<p>In addition to seeing how the proposed solution manages a multi-class parcel we would also like to see how the premise details, associated with a business assessment, are captured for each of the rented units in your commercial example. As used in the application of Business Assessment in the City of Winnipeg, a <u>premise</u> is the space your business occupies (a rentable area). If your business occupies a rentable area on the first floor of a building and a rentable area on the second floor of the same building these should be defined as two separate and distinct premises for business assessment purposes.</p> <p><u>Critical Steps</u></p> <p>Process Inputs:</p> <ul style="list-style-type: none"> • Customer/Owner Inquiries (through 311) • Permit – Building or Occupancy • Sales Questionnaire • Internal Assessor or Clerical Inquiry
<p>EXPECTED OUTCOME</p>	<p><u>Field data collection</u></p> <ul style="list-style-type: none"> • Show how data entry of parcels occurs (please show at least one commercial and one residential parcel example like the above samples). • Show how field data collection would work utilizing a field data collection device in addition to a paper process. • Show how you would add a street-level image to the parcel during data collection. • Show the sketching capabilities of the proposed solution. • Show how the property record card functionality works with the proposed solution. • Produce a cost and income value for a commercial parcel entered in this use case. • Show how you would print out a detailed cost or income valuation detail from the proposed solution. • Produce a market approach to value for a residential parcel entered in this use case. • Show how a Roll Estimate/“WHAT-IF” valuation function works within the proposed solution. • Show how the audit feature works in the proposed solution to track changes made during a field inspection. • Show how a commercial parcel you entered has distinct parts that are classified and taxed differently (split assessment). Show how these

different classed values are passed through when creating the real property roll.

- Describe or show how the use case process above can be integrated into a workflow/work management solution. Outline how you would use this to track progress, develop KPI's and estimate total assessed value growth for a calendar year.
- Show if the proposed solution has built-in quality control elements for data entry.
- Show the document management capabilities of the proposed solution.
- Show the permit tracking capabilities of the proposed solution.
- Discuss how an integration with the City Amanda permit application might work.

Desktop Data Collection

- Show how you collect or review parcel data from a desktop data collection toolset.
- Describe or show how the use case process above can be integrated into a workflow/work management solution. Outline how you would use this to track progress, develop KPI's and estimate total assessed value growth for a calendar year.
- Explain the variables and systems (CAMA, GIS, Street-level imaging, etc.) that your current clients use when doing desktop data collection.
- Show if the proposed solution has built-in quality control elements for data entry.
- Show how data from the field collective device syncs with the desktop CAMA toolset.

UseCase1BData

MARHSALL & SWIFT COST APPROACH

PID: 06-999999999

Building Number: 1/1

<i>Strip Mall – CRU Office Finish</i>									
M&S Occupancy	Class	HT	QUAL	STRY	LEVELS	AREA	PERIM	EYB	AGE
993-Interior Space, Office	D	24	2	2	2	12,000	380	2012	9

ELEMENT	DESCRIPTION	RATES	COST
Base Cost	D-Wood or steel framed exterior walls	\$62.05	\$744,600
HVAC	617-Complete HVAC	\$62.86	\$754,320
Substructure	Foundation adjustment		\$165,138
	Replacement Cost New		\$1,664,058
	Less GST (5%)		(\$83,202)
	RCN (GST adj)		\$1,580,856
	Less normal depreciation (7%)		(\$110,660)
	Subtotal		\$1,470,196
	RCNLD		\$1,470,196

LAND

No.	Class Liability	Type	PCT	Area	Rate	Land Value
1	1-60-T	PRI	100.0%	53,555	19.14	\$1,025,043
Total				53,555		\$1,025,043

TOTAL COST VALUE

Total RCNLD	\$1,470,196
Land Value	\$1,025,043
Total cost (land and improvements)	\$2,495,200

INCOME STREAM NSC-NBHD SHOPPING CENTRE

Year Built: 2012
 NCA: 550-Bear River
 Predominant # of Story's: 2
 Income Quality: Average
 Market Region: 1

Building ID	Premise ID	Tenant Class	Vacant	Floor	Leasable Area	Rent (\$ per Sq. Ft.)	Potential Rent
1/1	44567	A1-High Quality Finish	N	1	2,000	\$30.19	\$60,380
1/1	44568	A1-High Quality Finish	N	1	1,600	\$31.24	\$49,984
1/1	44569	A1-High Quality Finish	N	1	2,400	\$30.63	\$73,512
1/1	44570	A1-High Quality Finish	N	2	3,200	\$29.50	\$94,400
1/1	44571	Unfinished	Y	2	2,800	\$8.00	\$22,400
		Leasable Area (Sq. Ft.)			12,000		

INCOME VALUATION. 212116		
Potential Rent		\$300,676
Vacancy Loss	7%	(21,047)
Other Income		0
Effective Gross Income		\$279,629
Expenses (including Management)	12%	(33,555)
Shortfall @ \$5,43		(2,000)
Net Operating Income		\$244,074
Overall Capitalization Rate	7.15%	
Capitalized Value		\$3,413,622
Estimated Value (after adjustments)		\$3,413,622
Total Market Value at April 1, 2021		\$3,413,600

5 Commercial Rental Units

Unit 1 is 2,000 square feet / Unit 2 is 1,600 square feet / Unit 3 is 2,400 square feet/Unit 4 is 3,200 square feet/Unit 5 is 2,800 square feet, vacant and unfinished

- Unit 1 is a licensed daycare that qualifies for an exemption from Municipal and School Taxes. (Class Institutional-40 and Liability of Exempt (E))
- Unit 2 is a School of Music location that qualifies for a School Tax exemption as a seminary of learning under the current legislation. (Class Institutional-40 and Liability of School Tax Exempt (S))
- Unit 3 is used as a Law Office with no exemptions. (Class Other-60 and Liability Taxable (T))
- Unit 4 is used as a Law Office with no exemptions. (Class Other-60 and Liability Taxable (T))
- Unit 5 is currently vacant and not finished with any commercial finish. (Class Other-60 and Liability Taxable (T))

PERMIT DETAIL

Issue Date: 4/25/2011

Market Region: 1

PID: 06-999999999

PUC: CMRNS

Address: 1 Bear River Lot 1 Block 11 Plan 95999 RCMP

DMT: Address 1 Bear River

Location/Legal

NCA: 550 Bear River

Type of Work: Construct New Offices

Description: Professional certification program permit. Construct a 2 story 12,000 square foot building. District Inspector is John Doe. Please contact between 8AM-10AM Monday through Friday at 222-22-2222.

Applicant

Dave Dudley, Acme Builders

111 Northwest Adams St.

Winnipeg, MB R3C 0M6

Primary Phone 555-55-5555

Alt Phone

Owner

Bear River Development Corporation

Johnathan Apple

24 Peach Drive

Winnipeg, MB R3X 0G8

BUILDING INFORMATION

Imperial/Metric Values:	Metric values
Struct. Frame (only) Const. Value	
Previous Bldg. Use	
Standard Wood Frame?	
If not, indicate construction.	
Existing Gross Floor Area	
Total Gross Floor Area	12,000
Tenant Area	
Number of Tenants	
Previous Tenant Use	
New Gross Floor Area	
New Dwelling Units Created	0
Total Number of Dwelling Units	0
Dwelling Units Lost	

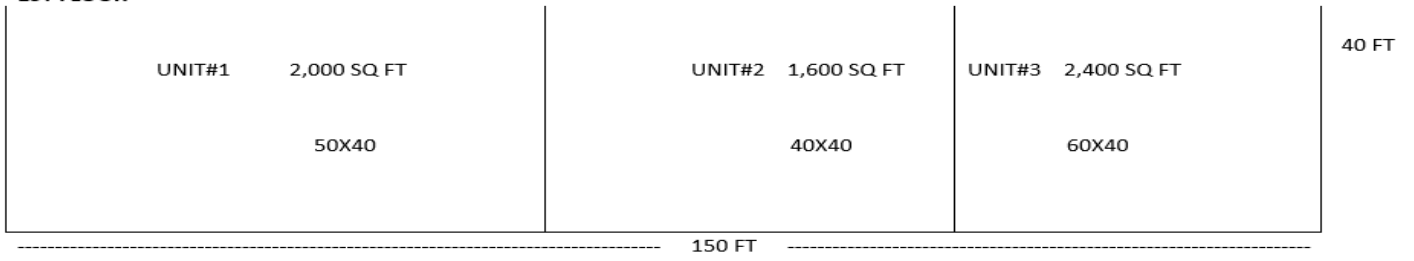
Number of Story's	2
Number of Story's below grade	0
Dimensions of Structure	
Building Height	
Area Finished Space	
Area Unfinished Space	
Area of Structure removed/demolished.	
Sprinkler	Not Sprinklered

GENERAL INFORMATION

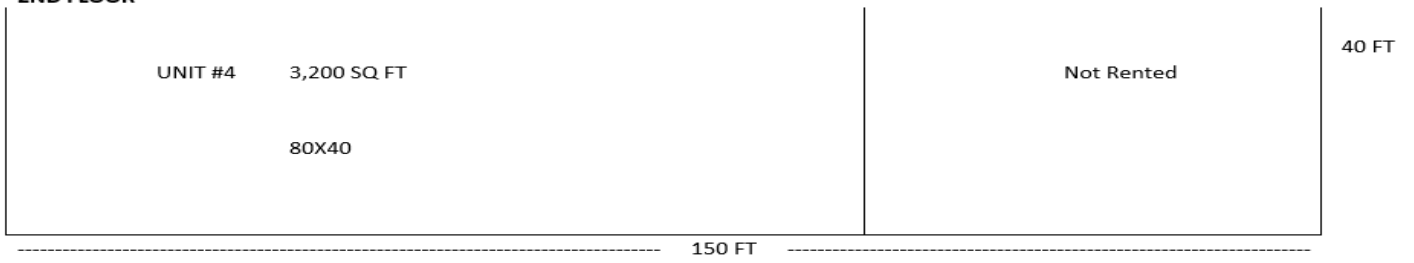
Total Project Value	\$2,500,000
Declared Construction Value	\$1,500,000
Construction Proposed State Date:	June 1, 2011
Zoning Designation	C2
Rooming House	
Demolition/Removal State Date	
Master Plan No.	
Plan File Code	Filed (Rolled)

1st Floor **150X40** **6,000**
2nd Floor **150X40** **6,000**

1ST FLOOR



2ND FLOOR



UseCase1BResidential

PID: 06-999999991

Address: 14 Wheatland Drive

ASSESSED VALUE INFORMATION

PARCEL FEATURES

NCA	550 Clove Creek	Land Drainage		Sidewalk	
Zoning	R1M-RES- S F – MEDIUM	Flood Zone		Landscaping	
Land Use Code	RES1	Ditches		Water	
Shape		Access Type		Hydro Overhead	
Parcel Size		Modeling Region		Hydro Underground	
Well		School Division	51 LOUIS RIEL	Gas	
Septic		Street Finish			
Holding Tank		Street Influence			

LAND

Land Type	Size	No/C/L	Override	% Excess	Land Value
Primary	4,788 Sq. Ft.	1/10/T	N		117,000
Influences:					

BUILDINGS – DETAIL

Building ID#		No/C/L	1/10/T	Year Built	2020
Building Model	R-Single Fam Res	Sub-model	2-Story	EYB	2020

	Actual Area	Living/Above Ground	Heated Area	Perimeter
AGM Attached Multi-Garage	440			84
BA Basement Area	1,160		1,160	138
MA Main Area	1,140	1,140	1,140	146
OH1 Cantilever Projection 1	30	30	30	0
OV1 Open Veranda 1 st floor	64			0
UA Upper Floor Area	1,160	1,160	1,160	138
Total Living/Above Ground			2,330	

VALUES

Total Land	117,000
Total Building	414,000
Total	531,000

BUILDING ATTRIBUTES

No.	Attribute Code	Attribute Value		No.	Attribute Code	Attribute Value
1005	Building Code	SD-Single Dwelling		1006	Building Type	TS-Two Story
1007	Style	TS-Two Story		1010	R-Quality	4-Good
1015	R-Structure			1040	R-Base Rate (Ext Wall)	Frame, Stucco or Siding
1041	Masonry Trim	Hip		1053	Energy Efficient	
1059	Roof Style	Forced Air Furnace		1060	R-Roof Cover	Composition Shingle
1070	R-Heat/Cool Rate			1074	Heat Pump	No
1075	Heat Recovery Ventilator			1076	Central AC	Yes
1080	R-Number of Fixtures			1082	Whirlpool	
1085	R-Amount per Fixture			1087	#Masonry Fireplaces	

1088	R-Fireplace Type Masonry			1089	#Zero Clear. Fireplaces	
1090	R-Fireplace Type Zero			1091	#Freestanding Stoves	
1092	R-Wood Stove			1100	R-Basement Base Rate	Total Basement Area (SF)
1105	Basement Type	FB-Full Basement		1110	R-Basement Finish Rate	
1115	R-% of Basement Finish			1118	Basement Finish Quality	
1130	R-Basement Garage Cost			1140	R-Attached Garage Rate	
1141	R-Basement Garage Rate			1142	R-Built In Garage Rate	
1145	R-Garage Finish Rate			1160	R-Area Over Garage Rate	
1170	R-Carport Base Rate			1180	R-Open Veranda	
1181	Glazed Veranda			1182	Sunroom	
1183	Wood Deck			1184	Canopy	
1185	Canopy Landing			1186	Lean-to	
1190	R-Breezeway Base Rate			1200	R-Balcony Base Rate	
1225	Conformity	Equal to Standard		1230	R-Current Cost Multiplier	
1240	R-Local Cost Multiplier			1260	R-Depreciation	
1262	Physical % Depreciation	0		1263	Functional % Depreciation	0
1264	Economic % Depreciation	0		1270	R-Condition (exterior)	3-Average
1271	Condition (Interior)	3-Average		9010	% Completed Construction	100

RESIDENTIAL ATTRIBUTES

	Total Rooms	7			Missing Floor Area	
	No. Bedrooms	3			Kitchen Quality	M-Modern
	Remodel Year				Whirlpool	
	Bath Quality	M-Modern			Central Vacuum	No
	No. Low Showers				Extra Fixtures	
	No. Avg Showers				Garage Type	AGM- Attached

						Garage Multiple
	No. Good Showers				Full Baths	2
	Piling	Yes			Half Baths	1
	Pool Type					

SALES TRANSACTIONS

Sale Date	Sale Price	Sworn Value	Sale Type	Verify Date	Verify ID	Verify	Qualified	Inc in Analysis	ASR
12/22/2020	447,055	447,054	FST	08/18/2021	XYZ	Purchaser	Y	Y	1.08
05/22/2020	123,900	123,900	Fee	12/07/2020	PDQ	LTO	Y	Y	0.98

PERMIT DETAIL

Issue Date: 5/01/2020

Amanda Status: Closed

Market Region: 10

PID: 06-999999999

PUC: RESSD

Amanda Address: 14 Wheatland Drive Lot33 Block 7 Plan 65025 RCMP

DMT Address: 14 Wheatland Drive

Location/Legal

NCA: 553 SAGE CREEK

Type of Work: Construct New SFD and Garage

Description: E-SUBMIT – Construct a 2 story 2,330 sq ft single family dwelling with an unfinished basement, a 440 sq ft attached garage, and a 20 sq ft covered front entry. All work must be inspected before being covered and at final completion.

Applicant

Barbara Boxer

Trusty Development Co.

222 Southeast Jefferson St.

Winnipeg, MB R4C 0L6

Primary Phone 555-55-5555

Alt Phone

BUILDING INFORMATION

Imperial/Metric Values:	Imperial values
Struct. Frame (only) Const. Value	
Previous Bldg. Use	
Standard Wood Frame?	
If not, indicate construction.	
Existing Gross Floor Area	
Total Gross Floor Area	
Tenant Area	
Number of Tenants	
Previous Tenant Use	
New Gross Floor Area	
New Dwelling Units Created	1
Total Number of Dwelling Units	
Dwelling Units Lost	

Number of Story's	2
Number of Story's below grade	0
Dimensions of Structure	
Building Height	
Area Finished Space	2,330
Area Unfinished Space	
Area of Structure removed/demolished.	
Sprinkler	

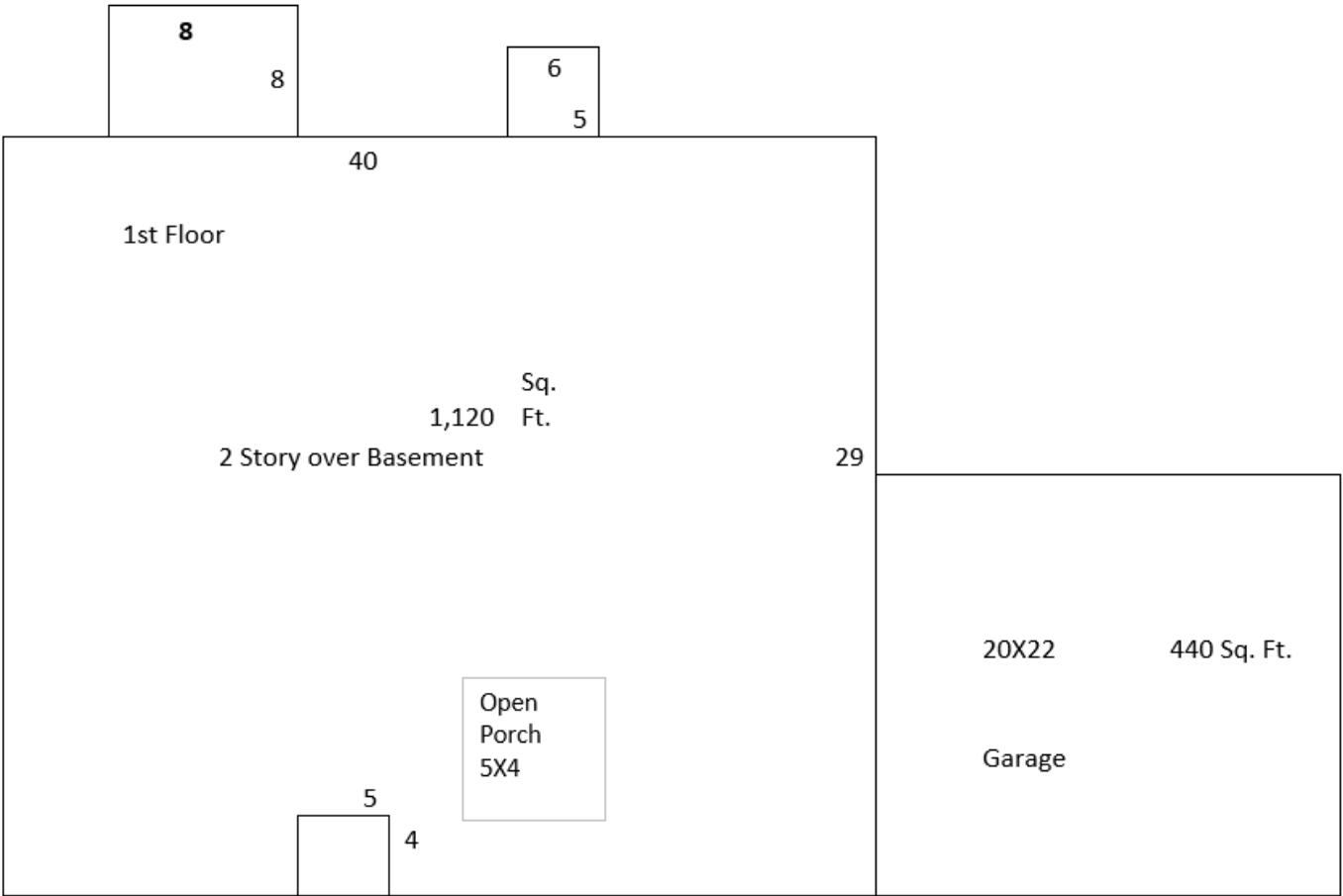
GENERAL INFORMATION

Total Project Value	
Declared Construction Value	\$286,500
Construction Proposed State Date:	
Zoning Designation	R1-M
Rooming House	
Demolition/Removal State Date	
Master Plan No.	
Plan File Code	Electronic Submission

Bas	40X29	1,160
1st Flr	40X29	1,120
2nd Flr	40X29	1,160

Overhead Cantilever
Projection
64 Sq. Ft.

Overhead Cantilever
Projection
30 Sq. Ft.



40

2nd Floor

1,160 Sq.
Ft.

20

1C: Parcel Maintenance - Income & Expense Data Collection

Use Case 1C: Parcel Maintenance - Income & Expense Data Collection	
BUSINESS SERVICE	Parcel Maintenance - Income & Expense Data Collection
DESCRIPTION	<p>The Assessment and Taxation Department (ATD) collects income and expense data from property owners in preparation of general assessments. For property assessments to reflect market value it is necessary to collect accurate income and expense data from all types of income producing properties including but not limited to leased buildings (office, retail, industrial, etc.), multi-family buildings, hospitality buildings (hotel, motels, etc.) and mixed-use buildings.</p> <p>The income and expense data are used to determine market parameters in data modeling for income producing properties, determining final assessed values, supporting values at appeal tribunals, and devising rental rates for business assessments.</p> <p>Respondents should include a description of how their system manages the interaction with the taxpayer, consolidates data and integrates the data with the proposed solution.</p>
KEY BUSINESS GOALS	<p>For this use case</p> <ul style="list-style-type: none"> • Collect income and expense information from owners of all types of income producing properties. • Verify income and expense information collected. • Enter or integrate information in the CAMA system to be available for model development of income properties. • Analyze available data determining key data points, for example: <ul style="list-style-type: none"> ○ Vacancy rates ○ Rental rates and rent type (gross, semi-gross, net) ○ Expense ratios ○ Shortfall rates ○ Capitalization rates ○ Occupancy costs • Determine realty assessed values of income producing properties. • Use rental rates to calculate annual rental value (ARV) to determine business assessed values.

<p>USE CASE</p>	<ul style="list-style-type: none"> • Demonstrate how the proposed solution would generate income and expense requests to send out to property owners. • Demonstrate how (or if) the proposed solution collects or enters income and expense data through an on-line method. • Describe the process for entering income and expense data collected through the mail into the proposed solution. • Demonstrate how the proposed solution would initiate an analysis of income data for use in income model development and property valuation. • Show how the proposed solution manages documents submitted by taxpayers. • Demonstrate the workflow capabilities of collecting and importing income and expense data in the proposed solution. <p><u>Critical Steps:</u></p> <ul style="list-style-type: none"> • Create information request packages (mailer packages) based on information to be collected. • Query data to determine whether a request letter is required. • Based on property type, determine which mailer package will be sent. • Generate and mail out mailer request packages to property owners. • Track replies to mailer request packages. • Enter information into the CAMA system. • Verify information entered into the CAMA system. • Analyze data to determine market parameters for income model development.
<p>EXPECTED OUTCOME</p>	<ul style="list-style-type: none"> • Show how the actual income and expense data for each parcel that returned a questionnaire is stored in the proposed solution. • Show how any documents received from the taxpayer are captured, stored, and made retrievable in the proposed solution. • Show if the proposed solution has built-in quality control elements for data entry. • Show an analysis of which properties returned income and expense data and which ones did not.

- Show how a preliminary analysis of income and expense data resulting in model preparation/creation might be conducted using the following areas to focus on:
 - Vacancy rates
 - Tenancy rates
 - Gross Income Multiplier
 - Occupancy costs
 - Rental rates
 - Expense ratios
 - Shortfall rates
 - Capitalization rates
- Show how adjustments are made to the income approach by either overriding fields, making percentage adjustments or other means of adjustment.
- Show how the solution provides proforma calculations.
- Show how direct capitalization, gross rent multiplier and gross income multiplier income approaches are implemented/applied in the proposed solution.
- Show how you define and implement itemized expenses within your income approach to value.
- Show how you manage excess land (residual land) when performing an income approach to value on a parcel that contains this variable.
- Show how the proposed solution would allow an appraiser to generate separate values per building on a property with multiple structures.

1D: Parcel Maintenance – Sales Data

Use Case 1D: Parcel Maintenance – Sales Data	
BUSINESS SERVICE	Parcel Maintenance – Sales Data
DESCRIPTION	The property sale workflow process from an LTO record update to sales validation completion, including workflow initiation, letter generation, sale verification review, property data collection, parcel history capture of data in an independent sale roll, and completion of the sales workflow.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • To describe all sales and to record under what conditions each sale was made. • To determine, verify and record whether a sale should or should not be included in the jurisdiction market analysis. • To determine and verify the condition and characteristics of the property at time of sale. • To determine benchmark assessments for sold properties to be used in determining assessment values for unsold properties. • To provide an accurate measurement of the level and uniformity of the mass appraisal values (ratio studies).
USE CASE	<ul style="list-style-type: none"> • Demonstrate how the proposed solution manages sales. Feel free to use a test database or other client database to show how valid and invalid sales are managed. • Demonstrate how the proposed solution creates a historical snapshot of a sale for use in market modelling. <ul style="list-style-type: none"> ○ Demonstrate how premise data is captured as part of the snapshot if applicable. • Demonstrate how the proposed solution checks actual sales against assessed values for uniformity and equity. • Demonstrate how the proposed solution uses workflow to validate and review sales. <p><u>Process Inputs</u></p> <ul style="list-style-type: none"> • Title information from the Property Registry (Land Titles Office (LTO)) • Property Sales Data (Multiple Listing Service (MLS), other outside sources) • Property Characteristics currently recorded in CAMA

	<ul style="list-style-type: none"> • GIS, aerial photography, Pictometry, and other documentation that are currently on file for properties that have been sold. <p><u>Critical Steps</u></p> <ul style="list-style-type: none"> • Identify and flag property sales on a regular interval. • Perform an initial office screening of the sale files to identify sales for further investigation. • Generate and mail Sales Questionnaire to new property owner as part of office review. • Generate and assemble the necessary information for property inspections where required. This could include: <ul style="list-style-type: none"> ○ Field Forms or Property Record Card (PRC). This could be printed or field data collection device. ○ Open permits or inquiries (311) ○ Sales Information for Verification ○ Pertinent MLS data ○ Title and/or company searches ○ I&E mailers and sales mailers (as needed) ○ Business Assessment information ○ Maps, photos, etc. • Collect and record available characteristic information while on site including any sketch updates and completing any outstanding sales verification. • Inquire as to any physical changes that may have occurred at the property since the time of the sale. • Review data and enter into CAMA or sync data from field data collection device. • Upload any documents or photographs collected as part of the inspection into Document Management (DM). • On an independent sales record used for analysis, adjust property characteristics to reflect property conditions at the time of the sale. • On the current assessment roll, process any required changes and create any necessary Adjustments to Roll (ATR). These adjustments typically create notices that are sent by mail to the property/business owner. • Submit adjustments for approval by Area Supervisor. • Approved adjustments sent to Data Services for processing and notice creation.
--	---

EXPECTED OUTCOME	<ul style="list-style-type: none"> • Show sales recorded in the proposed CAMA solution including under what conditions each sale was made. • Showcase the workflow used to verify each sale property.
-------------------------	---

- | | |
|--|---|
| | <ul style="list-style-type: none">○ Show initial filtering of sales that should not be field verified (\$0 sales, corporate transfers, etc.).○ Show how the proposed solution can initiate and automate sales review documents.● Show how valid sales can be plotted on an integrated map.● Determine and verify condition and characteristics of the property at time of sale and save the historical snapshot of the property for use in modeling.<ul style="list-style-type: none">○ Show how premise data is captured in the snapshot/history process (if available)● Demonstrate tools used to filter properties and sales data.● Show how valid sales are made available for modeling purposes.● Show how sales prices that are adjusted are documented in the proposed solution. |
|--|---|

2A: Parcel Valuation – Multiple Regression Analysis (MRA) / Market

Use Case 2A: Parcel Valuation – Multiple Regression Analysis (MRA) / Market	
BUSINESS SERVICE	Residential Parcel Valuation – Multiple Regression Analysis (MRA) / Modeled valuation methodology
DESCRIPTION	Multiple Regression Analysis (MRA) or other model techniques used for valuing residential/condominium property, including model integration, storage, and statistical testing. The capability to generate an automatic comparable sales approach for each residential/condominium parcel.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Single reference source for residential/condominium assessment data. • Industry standard mass appraisal technique using modeled and sales comparison approaches to value. • IAAO compliant comparable sales. • Statistical toolset, graphical output, and reporting capabilities.
USE CASE	<p>A revaluation of a residential or condominium parcel can take place for any of the following reasons:</p> <ul style="list-style-type: none"> • Reassessment • Appeal • Revision • Replot <p>For this use case we ask that you use a current client or test database to demonstrate the following capabilities in the proposed solution:</p> <ol style="list-style-type: none"> 1. Demonstrate how you would implement an MRA or other modeling approach to value residential and condominium properties. 2. Demonstrate how you work with the sales history file to extract sales for model inclusion. <ol style="list-style-type: none"> A. Include query capabilities and sales trimming. 3. Demonstrate what statistical tools modeled values are typically developed in using the proposed solution (or provide an overview of any tools that have been used). 4. Demonstrate how models are saved and applied to the parcel population. 5. Demonstrate how a comparable sales approach is implemented using the proposed solution.

**EXPECTED
OUTCOME**

- Review the process of how a model is created and saved in the proposed solution.
 - Show how the sales file is utilized in model building.
 - Show where is the syntax file stored.
- Review the historical/“snapshot” database and how these properties are used in the modeling process.
- Show how a modeled value is used in the proposed solution to value residential/condominium properties.
- Show how the proposed solution allows data transformations and statistical model analysis from R or similar statistical analysis modeling applications.
- Show how a model is run from within the proposed solution for a group of properties and a single property.
- Show how modeled values can be overridden in the system.
 - Show how overridden values are identified by a reason code.
- Show how the CAMA system audit trail captures model changes.
- Show how statistical testing of the model takes place and where the tests are saved within the proposed solution.
- Show how the proposed solution selects comparable sales for a subject property.
 - How are the comparable sales selected?
 - Discuss how comparable sales are saved to the system.
 - Discuss how the weighting system works in comparable sales.
 - Discuss how long this process should take to run for a population of 200,000+ residential/condominium parcels.
- Show how comparable sales are presented in the proposed solution.
 - Show how flexible the comparable sales components are to change.
- Show how to store and retrieve documents that are applicable to this process.
- Show how the proposed solution helps the jurisdiction meet IAAO standards with regards to the comparable sales approach to value.
- Select a market/model area and run a sales ratio study from within the application.
 - Descriptive statistics
 - Scatter plots
- Show how modeled values, ratios, sub-neighborhoods, and percent changes to the inventory are plotted on the integrated GIS system.

2B: Parcel Valuation – Income

Use Case 2B: Parcel Valuation – Income	
BUSINESS SERVICE	Parcel Valuation Income
DESCRIPTION	System technique used to apply the income approach to all applicable commercial, industrial, and residential property types best valued by the income approach. Include whether the model is run externally or within the CAMA system, storage of model details, and statistical testing methods. Currently the city uses multiple regression analysis to implement the income approach to value.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Single reference source for income approach assessment data. • Industry standard income approach to mass appraisal using the following approaches: <ul style="list-style-type: none"> ○ Direct Capitalization • Statistical toolset, graphical output, and reporting capabilities.
USE CASE	<p>A revaluation of a parcel using the income approach to value can take place for any of the following reasons:</p> <ul style="list-style-type: none"> • Reassessment • Appeal • Revision • Replot <p>For this use case we ask that you use a current client or test database to demonstrate how the proposed solution administers the income approach to value.</p> <ul style="list-style-type: none"> • Demonstrate how you would implement an income model to value commercial property. • Demonstrate various income model types (example): <ul style="list-style-type: none"> ○ Apartment models ○ Hotel/motel models ○ Retail/office models ○ Industrial ○ Mixed Use (Example Retail/Multifamily)

	<ul style="list-style-type: none"> • Demonstrate how you work with the income data: <ul style="list-style-type: none"> ○ This should include query capabilities (by property type, size, age, market area, etc.). ○ Development of model inputs. • Demonstrate what statistical tools are used to develop income models with regards to the proposed solution. • Demonstrate how models are saved and applied to the parcel population.
<p>EXPECTED OUTCOME</p>	<ul style="list-style-type: none"> • Review the process of how an income model is created and saved in the proposed solution. • Review how historical income and expense data is stored in the proposed solution for use in analysis. • Show how an income approach model is set up and used in the proposed solution to value income generating property. • Show how the model is run from within the proposed solution for a group of properties and a single property. • Show how the proposed solution provides for proforma calculations based on actual income data, model data or use overrides. • Show how the system audit trail captures income model changes and changes to an individual property. • Show how the proposed solution allows the assessor to use actual vs modeled income. • Show how the proposed solution allows the appraiser to override any of the income approach variables to arrive at a capital/market value for the property. • Show how itemized expense components are supported. • Show how the proposed solution manages excess land/residual land when implementing the income approach to value • Show a direct capitalization model • Show how the proposed solution will allow a Roll Estimate/“What-if” analysis to be completed on an income value without committing the changes to parcel record. • Show how to store and retrieve documents that are applicable to the income valuation process (rent rolls, etc.). • Show how income values or rental rates can be plotted on the integrated GIS system for review. • Select an income model type and run a sales ratio study from within the application to include: <ul style="list-style-type: none"> ○ Descriptive statistics ○ Scatter plots

2C: Parcel Valuation – Cost

Use Case 2C: Parcel Valuation – Cost	
BUSINESS SERVICE	Parcel Valuation – Cost
DESCRIPTION	Show how the proposed solution utilizes the cost approach to value (and what variables are used). The current solution is Marshall & Swift but other viable options will be considered. The cost approach to value is typically applied to limited market property, industrial, institutional property, agricultural property, and other others on an as needed basis.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Single reference source for cost approach data. • Industry standard mass appraisal using the cost approach to value (e.g., Marshall & Swift/Hanscomb/Craftsman). • Robust reporting, including property record cards, detailed cost work up and GIS mapping of value changes.
USE CASE	<p>For this use case we ask that you use a current client or test database to showcase the cost approach capabilities in the proposed solution:</p> <p>A revaluation of a cost parcel can take place for any of the following reasons:</p> <ul style="list-style-type: none"> • Reassessment • Appeal • Revision • Replot <p>Show how you would implement the cost approach to value an industrial or exempt property.</p>
EXPECTED OUTCOME	<ul style="list-style-type: none"> • Show how the cost approach to value is used in the proposed solution to value property. • A detail of the minimum and recommended characteristic requirements for producing a cost approach to value in the proposed solution. • Show a detailed cost work-up produced by the proposed solution. • Show how all forms of depreciation are managed in the proposed solution. • Show how you can override various components of the cost approach including depreciation. • Show how you can adjust various components of the cost approach.

- | | |
|--|---|
| | <ul style="list-style-type: none">• Show where the cost model is saved/maintained within the proposed solution.• Show how the model is run from within the proposed solution for a group of properties.• standards with regards to the cost approach to value.• "Show how you can do "what-if" analysis to a property without saving the changes to the current roll"• Show how building other features or yard improvements are valued using the cost approach.• Show how a partially completed building is valued using the cost approach.• Show that the proposed solution can value multiple buildings, on the same parcel, using the cost approach.• Show how the proposed solution audit trail captures cost model changes.• Show if more than one cost methodology can be implemented at the same time within the proposed solution.• Show if you can add a depreciated cost value for a parcel component of a property to its primary use income approach (gas station building valued on income but add canopy and tanks via cost). |
|--|---|

2D: Parcel Valuation – Land Valuation

Use Case 2D: Parcel Valuation – Land Valuation	
BUSINESS SERVICE	Parcel Valuation – Land Valuation
DESCRIPTION	MRA or other model techniques for valuing vacant land, examining how the model is run within the CAMA system, storage of model details, statistical testing, and audit trail capabilities within the CAMA system.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Single reference source for land assessment data. • Mass Appraisal methodology for valuing land at market value and/or agricultural use value. • Plotting of land values in GIS. • Statistical analysis as required.
USE CASE	<p>A revaluation of a land parcel can take place for any of the following reasons:</p> <ul style="list-style-type: none"> • Reassessment • Appeal • Revision • Replot <p>For this use case we ask that you use a current client or test database to showcase the following capabilities in the proposed solution:</p> <ul style="list-style-type: none"> • Demonstrate how you would implement a model to value vacant land. • Demonstrate how you work with the sales collected from use case 1D to extract sales data for land model inclusion. <ul style="list-style-type: none"> ○ Include data extract capabilities and sales trimming. • Demonstrate what statistical tools the modeled land values are typically developed in using the proposed solution (or provide an overview of any tools that have been used). • Demonstrate how models are saved and applied to the parcel population.
EXPECTED OUTCOME	<ul style="list-style-type: none"> • Show how land values are modeled and saved in the proposed solution. • Show how models are run against a group of parcels within the proposed solution. • Show how the proposed solution audit trail captures model changes.

- | | |
|--|--|
| | <ul style="list-style-type: none">• Show how statistical testing of the model takes place and where the tests are saved.• Show how influence factors are saved to a property record and then applied as a variable used to adjust a land value.• Show how land values can be plotted on a GIS map to show discrepancies in and between adjacent neighborhood land values. Show any other plots that you would like to showcase.• Show how a farm/agricultural parcel is valued containing both a market value and an agricultural value for land. |
|--|--|

3: Personal Property

Use Case 3: Personal Property	
BUSINESS SERVICE	Personal Property
DESCRIPTION	Demonstrate how to value Personal Property per the Manitoba Assessment Act regulation and the production of a Personal Property roll.
KEY BUSINESS GOALS	<ul style="list-style-type: none">• Single reference source for personal property data.• Statutory methodology for valuing property delineated as personal property.• Robust reporting including roll production.• Mapping and business intelligence.
USE CASE	<p>A revaluation of a personal property account can take place for any of the following reasons:</p> <ul style="list-style-type: none">• Reassessment• Appeal• Revision• Replot <p>For this use case we ask that you use a current client or test database to showcase the following capabilities in the proposed solution:</p> <ul style="list-style-type: none">• Demonstrate how to value personal property as per the attached regulated rates document. We understand that you may not be able to utilize the current tables from the regulated rates document for this demonstration.• If you cannot value personal property per the regulation, demonstrate how your current system manages personal property and discuss how you would manage and implement the Manitoba Personal Property regulations into the proposed solution.• Demonstrate how you would prepare/deliver a personal property assessment roll. <p>a. Attached is a copy of the Regulated Rates (personal property valuation legislation for Manitoba). This can be used to help</p>

	<p>configure and guide your valuation of personal property for this use case.</p> <p>b. Attached is a personal property roll report (valuation report) for a personal property parcel. Please show how this parcel would be currently valued in our current CAMA system.</p> <p>c. Please provide any additional details on your personal property module capabilities including GIS integration and what-if analysis.</p> <p><u>Provided Documents</u></p> <ul style="list-style-type: none"> • Personal Property Roll Sample • Personal Property Roll 06900002100 report • Regulated Rates Regulation <p>Enter data and value the personal property account attached. (Or explain how your current solution works and how it would be modified to value property according to Manitoba regulations).</p>
EXPECTED OUTCOME	<ul style="list-style-type: none"> • Show completed personal property account data entry. • Show personal property valuation of parcel 06900002100 (or discuss how you would value this property in the proposed solution). • Show a personal property roll report. <ul style="list-style-type: none"> ○ Show the steps that are required to create the personal property roll. • Show a plotting of personal property values using GIS. • Show how changes to personal property account are captured using audit trail in proposed solution. • Show how you can do “what-if” analysis to a personal property account without saving the changes to the system.

Personal Property Roll Sample

TAX_YEAR	MUNI_NAME	ROLL_NO	ROLL_NO_TYP	CIVIC_ADDR	SURV_DESC	COMPANY_NAME	MAILING_ADDRESS_INFORMATION	INT_FRAC	INT_TYP_CD	OWNER_COUNT	CURR_ASMT_TOT	PORT_ASMT_TOT	CLASS_COUNT	CLASS1	LIAB1
2023	City of Winnipeg	06900002100	Personal	Property Address not found	GAS DISTRIBUTION SYSTEM IN SCHOOL DIVISION NO 51	Company	Company Address	Company Inc.	Registered Owner	1	51,215,164	33,289,857	1	60	Grant

Personal Property Roll 06900002100 report

Roll Number: 06900002100

Roll Year: 2023 (0)

Cost Report

Detached Structures

MISC ID	2519				60-G
G24 - Gas Distrib-Pipe, 14"	23,451 lineal feet	@ \$71.40	RCN	1,674,401	
		Less normal depreciation @		0%	
			RCNLD	1,674,401	
MISC ID	15447				60-G
G21 - Gas Distrib-Pipe 6"	4,860 lineal feet	@ \$14.40	RCN	69,984	
		Less normal depreciation @		0%	
			RCNLD	69,984	
MISC ID	17707				60-G
GV4 - Gas Distrib- Service Line	36,184 count	@ \$675.00	RCN	24,424,200	
		Less normal depreciation @		0%	
			RCNLD	24,424,200	
MISC ID	89043				60-G
G13 - Gas Distrib-Pipe 2"	1,467,205 lineal feet	@ \$5.90	RCN	8,656,510	
		Less normal depreciation @		0%	
			RCNLD	8,656,510	
MISC ID	99139				60-G
G12 - Gas Distrib-Pipe 1.5"	3,499 lineal feet	@ \$4.20	RCN	14,696	
		Less normal depreciation @		0%	
			RCNLD	14,696	
MISC ID	123892				60-G
GM4 - Gas Distrib-Gasometer	38,896 count	@ \$65.00	RCN	2,528,240	
		Less normal depreciation @		0%	
			RCNLD	2,528,000	
MISC ID	125552				60-G
G23 - Gas Distrib-Pipe, 12"	23,469 lineal feet	@ \$59.60	RCN	1,398,752	
		Less normal depreciation @		0%	
			RCNLD	1,398,752	
MISC ID	131436				60-G
G15 - Gas Distrib-Pipe 4"	317,240 lineal feet	@ \$8.80	RCN	2,791,712	
		Less normal depreciation @		0%	
			RCNLD	2,791,712	
MISC ID	141188				60-G
G22 - Gas Distrib-Pipe 8"	150,773 lineal feet	@ \$29.70	RCN	4,477,958	
		Less normal depreciation @		0%	
			RCNLD	4,477,958	
MISC ID	141605				60-G
G14 - Gas Distrib-Pipe 3"	520 lineal feet	@ \$7.70	RCN	4,004	
		Less normal depreciation @		0%	
			RCNLD	4,004	
MISC ID	148791				60-G
G11 - Gas Distrib-Pipe 1"	4,460 lineal feet	@ \$3.80	RCN	16,948	
		Less normal depreciation @		0%	
			RCNLD	16,948	
MISC ID	165928				60-G

Roll Number: 06900002100

Roll Year: 2023 (0)

MR - Gas Distrib-Meas/Reg Stat	7,248,186 historic cost \$	@ \$1.09	RCN	7,904,190
		Less normal depreciation @		35%
			RCNLD	5,137,724

MISC ID	178936			60-G
----------------	---------------	--	--	-------------

G25 - Gas Distrib-Pipe, 16"	256 lineal feet	@ \$79.20	RCN	20,275
		Less normal depreciation @		0%
			RCNLD	20,275

Total RCNLD (all Detached Structures)	51,215,164
---	-------------------

Roll Number: 06900002100

Roll Year: 2023 (0)

Land

No.	Class-Liability	Type	PCT	Area (sf)	Rate (sf)	Land Value
1	1-60 G	PRI	100.0%	1		0
Total				1		0

Land Notes

No. Class-Liability

Parcel Summary (Cost Approach)

Replacement Cost New (all buildings)	0
Less accrued depreciation and GST (all buildings)	(0)
Total RCLND (all buildings)	0
Total RCNLD (all detached structures)	51,215,164
Total RCNLD	51,215,164
Land value	
Total cost (land and improvements)	\$51,215,164

Classification and Liability Allocation

Approach to value: Cost

Land

Site	PCT	Area (sf)	Land Value	Class Code	Liability	MAA
1	100.0%	1	0	60 - Other	Grant	MAA 22(1)A

Building

Site	Building	Detached	Total	Class Code	Liability	MAA
1	0	51,215,164	51,215,164	60 - Other	Grant	MAA 22(1)A

Land and Building Summary

Site	Land	Building	Total	Class Code	Liability	MAA
1	0	51,215,164	51,215,164	60 - Other	Grant	MAA 22(1)A

Note: Figures within this report may not sum to total due to internal rounding.

Roll Number: 06900002100

Roll Year: 2023 (0)

Regulated Rates Regulation

As of 11 May 2023, this is the most current version available. It is current for the period set out in the footer below. It is the first version and has not been amended.

Le texte figurant ci-dessous constitue la codification la plus récente en date du 11 mai 2023. Son contenu était à jour pendant la période indiquée en bas de page. Il s'agit de la première version; elle n'a fait l'objet d'aucune modification.

THE MUNICIPAL ASSESSMENT ACT
(C.C.S.M. c. M226)

**Railway Roadway Property, Pipeline Property
and Gas Distribution Systems (2023)
Regulation**

LOI SUR L'ÉVALUATION MUNICIPALE
(c. M226 de la C.P.L.M.)

**Règlement de 2023 sur les biens de voie de
chemin de fer, les biens de pipeline et les
réseaux de distribution de gaz**

Regulation 142/2022
Registered December 2, 2022

Règlement 142/2022
Date d'enregistrement : le 2 décembre 2022

TABLE OF CONTENTS

Section	
1	Definitions
2	Basis for assessment
3	Land assessment
4	General assessment — railway roadway property
5	Adjustments — railway roadway property
6	Assessment of pipeline property
7	General assessment — pipeline property
8	Adjustments — pipelines
9	General assessment — gas distribution systems
10	Definitions — Schedule C

SCHEDULES

TABLE DES MATIÈRES

Article	
1	Définitions
2	Base d'évaluation
3	Évaluation des biens-fonds
4	Évaluation générale — biens de voie de chemin de fer
5	Rajustements — biens de voie de chemin de fer
6	Évaluation des biens de pipeline
7	Évaluation générale — biens de pipeline
8	Rajustements — pipelines
9	Évaluation générale — réseaux de distribution de gaz
10	Définitions — annexe C

ANNEXES

Definitions

1 The following definitions apply in this regulation.

"**pipeline property**" has the same meaning as "pipelines", as defined in *The Municipal Assessment Act*. (« biens de pipeline »)

"**railway roadway property**" has the same meaning as "railway roadway", as defined in *The Municipal Assessment Act*. (« biens de voie de chemin de fer »)

Définitions

1 Les définitions qui suivent s'appliquent au présent règlement.

« **biens de pipeline** » Pipeline au sens de la *Loi sur l'évaluation municipale*. ("pipeline property")

« **biens de voie de chemin de fer** » Voie de chemin de fer au sens de la *Loi sur l'évaluation municipale*. ("railway roadway property")

RAILWAY ROADWAY PROPERTY

BIENS DE VOIE DE CHEMIN DE FER

Basis for assessment

2 Railway roadway property in a municipality shall be assessed on the basis of

- (a) the gross tonnage that is carried on tracks in a subdivision of railway roadway property;
- (b) the mileage of track; and
- (c) the land that comprises the railway roadway property.

Base d'évaluation

2 Les biens de voie de chemin de fer qui se trouvent dans une municipalité sont évalués en fonction des facteurs suivants :

- a) le poids brut en tonnes transporté sur les voies ferrées dans une subdivision de biens de voie de chemin de fer;
- b) la longueur de la voie;
- c) les biens-fonds que comprennent les biens de voie de chemin de fer.

Land assessment

3 Land that comprises railway roadway property shall be assessed at the average assessed value of all land in the municipality on the reference date.

Évaluation des biens-fonds

3 Les biens-fonds compris dans les biens de voie de chemin de fer sont évalués au taux de la moyenne de la valeur déterminée de tous les biens-fonds dans la municipalité pour la date de référence.

General assessment — railway roadway property

4 Subject to section 5, for the purpose of the general assessment for 2023, the assessed value of improvements on railway roadway property shall be calculated on the gross tonnage carried on tracks on the railway roadway property, at the rates per mile of track set out in Schedule A.

Évaluation générale — biens de voie de chemin de fer

4 Sous réserve de l'article 5 et en vue de l'évaluation générale pour 2023, la valeur déterminée des améliorations apportées aux biens de voie de chemin de fer est calculée en fonction du poids brut en tonnes transporté sur les voies ferrées qui se trouvent dans les biens de voie de chemin de fer, conformément au barème de taux par mille de voie ferrée prévu à l'annexe A.

Adjustments — railway roadway property

5(1) Where railway roadway property has more than one track, the rate set out in Schedule A shall be applied to one track, and one-half of that rate shall be applied to each additional track.

5(2) For the purposes of the general assessment for 2023,

(a) track that is owned by a railway company and not located on the right-of-way shall be assessed at \$250,600 per mile; and

(b) spur track shall be assessed at \$250,600 per mile and each turnout shall be assessed at \$22,150.

5(3) Rail lines abandoned in place shall not be assessed.

PIPELINE PROPERTY

Assessment of pipeline property

6 Pipeline property in a municipality shall be assessed on the basis of

(a) the diameter of the pipe; and

(b) the number of miles of pipeline.

General assessment — pipeline property

7 Subject to section 8 for the purpose of the 2023 general assessment, the assessed value of a pipeline property shall be calculated on the rates per mile set out in Schedule B.

Adjustments — pipelines

8(1) Where there is more than one pipeline on pipeline property that is contiguous, the rate of assessment shall be applied to the pipeline that has the largest diameter, and each additional pipeline shall be assessed at 55% of the rate that applies to its diameter.

Rajustements — biens de voie de chemin de fer

5(1) Lorsque des biens de voie de chemin de fer contiennent plusieurs voies ferrées, une des voies est évaluée au taux approprié prévu à l'annexe A et chaque autre voie est évaluée à la moitié de ce taux.

5(2) En vue de l'évaluation générale pour 2023 :

a) les voies qu'une compagnie de chemin de fer possède et qui ne sont pas situées sur l'emprise sont évaluées au taux de 250 600 \$ par mille;

b) les embranchements sont évalués au taux de 250 600 \$ par mille et chaque branchement est évalué au taux de 22 150 \$.

5(3) Les voies ferrées abandonnées ne sont pas évaluées.

BIENS DE PIPELINE

Évaluation des biens de pipeline

6 Les biens de pipeline qui se trouvent dans une municipalité sont évalués en fonction des facteurs suivants :

a) le diamètre du tuyau;

b) le nombre de milles du pipeline.

Évaluation générale — biens de pipeline

7 Sous réserve de l'article 8 et en vue de l'évaluation générale pour 2023, la valeur déterminée d'un pipeline est calculée en fonction des taux par mille figurant à l'annexe B.

Rajustements — pipelines

8(1) Lorsque des biens de pipeline contiennent plusieurs pipelines contigus, le taux d'évaluation s'applique au pipeline ayant le plus grand diamètre, tandis que les autres pipelines sont évalués à 55 % du taux correspondant à leurs diamètres.

8(2) A pipeline that has been temporarily removed from service at the time of the general assessment shall be assessed at 50% of the rate that would apply if it were operated at capacity.

8(3) A pipeline that is permanently removed from service shall not be assessed.

8(2) Les pipelines qui ont été mis temporairement hors service au moment de l'évaluation générale sont évalués à 50 % du taux qui serait applicable s'ils étaient exploités à pleine capacité.

8(3) Les pipelines qui ont été mis définitivement hors service ne font l'objet d'aucune évaluation.

GAS DISTRIBUTION SYSTEMS

General assessment — gas distribution systems

9 For the purpose of the 2023 general assessment, an assessor shall assess a gas distribution system by assessing its components in accordance with Schedule C.

Definitions — Schedule C

10 The following definitions apply in Schedule C.

"**rural area**" means a municipality that is a rural municipality as set out in the *Municipal Status and Boundaries Regulation*, Manitoba Regulation 567/88 R. (« zone rurale »)

"**urban area**" means

(a) a city, town or village set out in the *Municipal Status and Boundaries Regulation*, Manitoba Regulation 567/88 R;

(b) a local urban district formed or continued as a local urban district in the *Local Urban Districts Regulation*, Manitoba Regulation 174/99; and

(c) the City of Winnipeg. (« zone urbaine »)

RÉSEAUX DE DISTRIBUTION DE GAZ

Évaluation générale — réseaux de distribution de gaz

9 En vue de l'évaluation générale pour 2023, l'évaluateur évalue les réseaux de distribution de gaz conformément à l'annexe C.

Définitions — annexe C

10 Les définitions qui suivent s'appliquent à l'annexe C.

« **zone rurale** » Municipalité rurale au sens du *Règlement sur le statut et les limites des municipalités*, R.M. 567/88 R. ("rural area")

« **zone urbaine** » Sont assimilés à une zone urbaine :

a) les villes et les villages au sens du *Règlement sur le statut et les limites des municipalités*, R.M. 567/88 R;

b) les districts urbains locaux constitués ou maintenus en vertu du *Règlement sur les districts urbains locaux*, R.M. 174/99;

c) la ville de Winnipeg. ("urban area")

SCHEDULE A
(Section 4)

GENERAL ASSESSMENT — IMPROVEMENTS ON RAILWAY ROADWAY PROPERTY

Gross Tonnage (in millions of tons)	General Assessment for 2023 Rate per Mile of Track
0	\$0.00
Less than 5	\$59,900
5 or more, but less than 10	\$187,000
10 or more, but less than 15	\$314,200
15 or more, but less than 20	\$433,800
20 or more, but less than 25	\$560,800
25 or more, but less than 30	\$680,700
30 or more	\$747,900

SCHEDULE B
(Section 7)

GENERAL ASSESSMENT — PIPELINE PROPERTY RATES PER MILE

Outside diameter of pipe (inches)	General Assessment for 2023 Rate Per Mile
Less than 3	\$59,600
3 or more, but less than 4	\$74,200
4 or more, but less than 6	\$95,100
6 or more, but less than 8	\$132,300
8 or more, but less than 10	\$176,400
10 or more, but less than 12	\$251,200
12 or more, but less than 14	\$317,500
14 or more, but less than 16	\$371,500
16 or more, but less than 18	\$417,400
18 or more, but less than 20	\$449,800
20 or more, but less than 22	\$505,500
22 or more, but less than 24	\$582,300
24 or more, but less than 26	\$615,800
26 or more, but less than 28	\$671,900
28 or more, but less than 30	\$763,100
30 or more, but less than 32	\$814,500
32 or more, but less than 34	\$872,600
34 or more, but less than 36	\$933,600
36 or more, but less than 38	\$1,054,700
38 or more, but less than 40	\$1,182,000
40 or more, but less than 42	\$1,272,800
42 or more, but less than 44	\$1,382,100
44 or more, but less than 46	\$1,449,800
46 or more, but less than 48	\$1,625,300
48 or more	\$1,707,000

SCHEDULE C
(Section 9)

GENERAL ASSESSMENT — GAS DISTRIBUTION SYSTEMS

Component of Gas Distribution System	2023 General Assessment	
Each regulator station	at its April 1 st 2021 depreciated replacement cost	
Each gasometer	\$65	
Each pipe connecting to one or more gasometers	\$675	
Each pipe, other than a pipe connecting to one or more gasometers, based on the pipe's outside diameter in inches	Rural Area (rate per foot)	Urban Area (rate per foot)
1" or less	\$2.70	\$3.80
1½"	\$3.20	\$4.20
2"	\$4.40	\$5.90
3"	\$5.80	\$7.70
4"	\$7.20	\$8.80
6"	\$10.50	\$14.40
8"	\$21.80	\$29.70
12"	\$43.90	\$59.60
14"	\$52.40	\$71.40
16"	\$58.20	\$79.20

ANNEXE A
(article 4)ÉVALUATION GÉNÉRALE — AMÉLIORATIONS APPORTÉES AUX BIENS
DE VOIE DE CHEMIN DE FER

Poids brut en tonnes	Évaluation générale pour 2023 Taux par mille de voie ferrée
Aucun poids	0 \$
Moins de 5 millions de tonnes	59 900 \$
De 5 millions à 10 millions de tonnes exclusivement	187 000 \$
De 10 millions à 15 millions de tonnes exclusivement	314 200 \$
De 15 millions à 20 millions de tonnes exclusivement	433 800 \$
De 20 millions à 25 millions de tonnes exclusivement	560 800 \$
De 25 millions à 30 millions de tonnes exclusivement	680 700 \$
30 millions de tonnes ou plus	747 900 \$

ANNEXE B
(article 7)

ÉVALUATION GÉNÉRALE — TAUX PAR MILLE POUR LES BIENS DE PIPELINE

Diamètre extérieur du tuyau (en pouces)	Évaluation générale pour 2023 Taux par mille
Moins de 3	59 600 \$
3 à 4 exclusivement	74 200 \$
4 à 6 exclusivement	95 100 \$
6 à 8 exclusivement	132 300 \$
8 à 10 exclusivement	176 400 \$
10 à 12 exclusivement	251 200 \$
12 à 14 exclusivement	317 500 \$
14 à 16 exclusivement	371 500 \$
16 à 18 exclusivement	417 400 \$
18 à 20 exclusivement	449 800 \$
20 à 22 exclusivement	505 500 \$
22 à 24 exclusivement	582 300 \$
24 à 26 exclusivement	615 800 \$
26 à 28 exclusivement	671 900 \$
28 à 30 exclusivement	763 100 \$
30 à 32 exclusivement	814 500 \$
32 à 34 exclusivement	872 600 \$
34 à 36 exclusivement	933 600 \$
36 à 38 exclusivement	1 054 700 \$
38 à 40 exclusivement	1 182 000 \$
40 à 42 exclusivement	1 272 800 \$
42 à 44 exclusivement	1 382 100 \$
44 à 46 exclusivement	1 449 800 \$
46 à 48 exclusivement	1 625 300 \$
48 ou plus	1 707 000 \$

ANNEXE C
(article 9)

ÉVALUATION GÉNÉRALE — RÉSEAUX DE DISTRIBUTION DE GAZ

Composante du réseau de distribution de gaz	Évaluation générale pour 2023	
Chaque station régulatrice	L'équivalent du coût de remplacement déprécié au taux du 1 ^{er} avril 2021	
Chaque gazomètre	65 \$	
Chaque tuyau branché à au moins un gazomètre	675 \$	
Pour les tuyaux, autres que ceux branchés à au moins un gazomètre, en fonction de leur diamètre extérieur en pouces	Zone rurale (taux du pied)	Zone urbaine (taux du pied)
1 po ou moins	2,70 \$	3,80 \$
1½ po	3,20 \$	4,20 \$
2 po	4,40 \$	5,90 \$
3 po	5,80 \$	7,70 \$
4 po	7,20 \$	8,80 \$
6 po	10,50 \$	14,40 \$
8 po	21,80 \$	29,70 \$
12 po	43,90 \$	59,60 \$
14 po	52,40 \$	71,40 \$
16 po	58,20 \$	79,20 \$

4: Business Valuation

Use Case 4: Business Valuation	
BUSINESS SERVICE	Business Valuation
DESCRIPTION	Demonstrate how the proposed solution manages business assessment for tenants in a commercial property. Calculate an Annual Rental Value (ARV) for Business Assessment (BA) and incorporate source systems to ensure timely updates for tenant changes. Ability to maintain a separate Business Assessment Roll for the purpose of business taxation.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • To maintain an updated, independent Business Assessment Roll. • Single reference source for business assessment data. • Robust reporting, with dashboards, and business intelligence.
USE CASE	<p>Premises used or occupied for carrying on business in the City of Winnipeg are subject to a Business Assessment (BA) that is equal to the Annual Rental Value (ARV) of the premises.</p> <p>In this Use Case we would like you to demonstrate how you manage premises of a commercial building within the proposed solution.</p> <ul style="list-style-type: none"> • Business Assessments are finalized by calculating the Annual Rental Value (ARV) • Please note that the ARV is made up of two components; <ul style="list-style-type: none"> ○ 1) Prevailing net rent, the prevailing net rent is typically the same as the net rent used in the income approach (though it can be overridden). ○ 2) Occupancy costs. Occupancy costs are applied to the actual square footage that is applicable to each cost. These two values, once calculated are used to arrive at an Annual Rental Value (ARV) • Demonstrate how you capture the premise of individual businesses within a commercial property. You can use the data from Use Case 1B if you do not have a property that you would prefer to use. • Demonstrate how the proposed solution manages the tenants and resultant business assessments. This should include a Business Assessment ID and Premise ID for each business in the building. <p>Please note the following:</p> <ul style="list-style-type: none"> • If the solution cannot demonstrate the functionality outlined above live, please provide an overview of how you would accomplish this. • The city assigns a Business ID to a taxable party at each location. This Business ID can move, with the party, to another location.

	<ul style="list-style-type: none"> • Premise: As used in the application of Business Assessment in the City of Winnipeg, is the space a business occupies (a rentable area). If a business occupies a rentable area on the first floor of a building and a rentable area on the second floor of the same building it should be defined as two separate and distinct premises for business assessment purposes. • A Premise ID is assigned to each area within a property denoting a tenant or leasable space. • Some businesses may occupy multiple premises within a property. In these cases, each premise should be calculated individually with the resulting values added together for a single Business Assessment value. • In the case of a property valued on the cost approach or a vacant lot, the Business Assessment is typically valued as 10% of the real property value. <p>THE DOCUMENT BELOW SHOWS AN EXAMPLE OF A BUSINESS ASSESSMENT NOTICE.</p> <ul style="list-style-type: none"> • 2023 BRBusinessAssessment - CRIPPLE CREEK BLVD 2023
<p>EXPECTED OUTCOME</p>	<ul style="list-style-type: none"> • Show how Business Assessment data is entered for each premise of a parcel into the proposed system. • Show how to calculate the Annual Rental Value for each premise. • Show how two or more premises occupied by the same business, on a single property, are added together when the business assessment notice is created. • Show that a change in a Business Assessment does not change the real property value of the same parcel. • Show how the audit trail captures changes to a premise. • Show how you would create a Business Assessment for a commercial property valued by the cost approach. • Show how you would track a property located in a Business Improvement Zone. • Show how you would complete an override to the Business Assessment. Any field should be able to be overridden. • Show how you will produce a Business Assessment Roll. • Show how to plot Business Assessments using GIS.

2023 BRBusinessAssessment - CRIPPLE CREEK BLVD 2023

BUSINESS ASSESSMENT REPORT 2023 Assessment (April 1, 2021 Market Value)

Board of Revision Information	Assessment Information
File No:	Roll Year: 2023
Hearing Date:	Address: 50 CRIPPLE CREEK BLVD
Hearing Location:	Business Assessment ID: 54321
Applicant:	Business Name: JOHNSON BROTHERS INSURANCE
Respondent:	Owners: EASTERN FINANCIAL GROUP INC

Total Annual Rental Value (ARV)	Total Area of all Premises	Overall ARV per sq. ft.
\$60,720	1,658 sq. ft.	\$36.62

SUBJECT BID: 54548

Premise ID	Premise Address	Premise Area	Base ARV	Base ARV Per Sq.Ft.	Occupancy Costs				Total Occupancy Costs	Annual Rental Value
					Heat	Electricity	Water	Air Cond.		
					Rate 0.60	Rate 1.30	Rate 0.25	Rate 0.35		
					Area	Area	Area	Area		
12345	50 CRIPPLE CREEK BLVD	1,658	\$56,554	\$34.11	1,658	1,658	1,658	1,658	\$4,145	\$60,720

SUBJECT LEASE INFORMATION: Owner Occupied: No

BID #	Premise ID	Premise Address	Rent Type	Lease Start	Lease Term	Reported Area	Reported Rent per Sq.Ft.
54548	33734	50 CRIPPLE CREEK BLVD	Net	01-Sep-2013	9 Years 11 Months	1,658	\$29.00

RENT COMPARABLES:

BID #	Premise ID	Premise Address	Lease Start	Lease Term	Reported Area	Reported Rent per Sq.Ft.
						\$

RECOMMENDATION:

5A: Appeals - Board of Revision (BOR)

Use Case 5A: Appeals - Board of Revision (BOR)	
BUSINESS SERVICE	Appeals - Board of Revision (BOR)
DESCRIPTION	Processing and tracking of appeals, following workflow steps. The solution should generate an evidence package for submission to appeal boards and allow easy modification of any pre-defined reports. There should also be tight integration with City Clerk's appeal system for seamless case management.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Work all appeals in a timely manner. • Provide the Board of Revision with copies of comparable sales report at least one working day before the scheduled hearing date for Residential Applications. • Provide the Board of Revision with the brief and the City recommendation at least 2 working days before the scheduled hearing date for Business Assessment Applications. • Provide the Board of Revision with the brief at least 14 working days before the hearing for all commercial / industrial applications.
USE CASE	<p>Using a current client or test database, show how the proposed solution will manage multiple levels of appeal for a real property, personal property or business assessment account. During the first level of appeal, The Board of Revision (BOR), demonstrate how the system is typically set up and functions to track appeals internally. Please note that BOR appeal is filed with the City Clerk's Office, this office also manages scheduling the hearing date/time/location.</p> <ul style="list-style-type: none"> • Demonstrate how the proposed solution initiates an appeal workflow once notice is received from the City Clerk that a Board of Revision hearing has been filed for a property. • Demonstrate how the proposed solution can be configured to select and print out reports, documents, and other material, as defined by the assessor, in preparation for the Board of Revision hearing. • Demonstrate how the proposed solution manages documents, requests for information and property agents. • Demonstrate how the proposed solution helps your current clients with managing, reducing and/or defending appeals. <p>Critical Steps:</p>

	<ul style="list-style-type: none"> • Process Inputs: Receive appeal notices from City Clerk. • Compile relevant documents for appeal as determined by assessor. • Request data from property owner/agent and track as part of the appeal file. • Enter final adjudication of appeal into system and process as required. <p><u>Documents:</u> Included is an application to file an appeal with the Board of Revision. This will provide background data on the depth and breadth of data being collected during this level of appeal.</p>
<p>EXPECTED OUTCOME</p>	<ul style="list-style-type: none"> • Show how the proposed solution uses workflow to manage appeal cases across the various property types (Residential, Commercial, Business, etc.). • Show how the proposed solution can have different brief templates, standard templates and then those that conform with the standards of professional appraisal practice (CUSPAP) • Show how the proposed solution can generate demand requests and demands for information from the property owner and how it captures the dates related to these requests. • Show how appeal data including filing dates, reasons, and desired value are captured. • Show how you track if a property is being represented by someone who is not the owner and show where you would capture this data. • Show how the proposed solution generates an automated appeal brief. <ul style="list-style-type: none"> ○ Show how you can modify the appeal brief. <ul style="list-style-type: none"> ▪ Show how you can have different appeal briefs by year. ○ Show how you select sales or rents for use in appeals. • Show a map of appeals or comparable sales using GIS integration. • Show how final BOR decisions are captured and processed. • Show how the proposed solution captures electronic signatures for settlement & waiver documents.



THE CITY OF WINNIPEG
BOARD OF REVISION

CITY CLERK'S DEPARTMENT
SUSAN A. THOMPSON BUILDING, 510 MAIN STREET
WINNIPEG, MANITOBA, R3B 1B9
TELEPHONE: 311 FAX: 204-947-3452 E-MAIL: BOR@WINNIPEG.CA



APPLICATION FOR REVISION FORM

OFFICE USE ONLY

FILE DATE RECEIVED

\$ CASH CHEQUE DEBIT VISA MASTERCARD AMERICAN EXPRESS

THIS APPLICATION MUST BE ACCOMPANIED BY THE APPROPRIATE NON-REFUNDABLE FILING FEE PAYMENT AND MUST BE SUBMITTED TO THE BOARD OF REVISION OFFICE ON OR BEFORE THE LEGISLATED DEADLINE

By filling out and submitting an application for revision form, you are hereby consenting to allow your personal information to be part of the public record. Your personal information is being collected under the authority of The City of Winnipeg Charter Act, and is protected by the Protection of Privacy provisions of The Freedom of Information and Protection of Privacy Act. This information will be used as part of the record of hearing bodies and will not be used or disclosed for any other purposes, except as authorized by law. If you have any questions about the collection of this information, contact the Corporate FIPPA Coordinator, City Clerk's Department, Susan A. Thompson Building, 510 Main Street, Winnipeg MB, R3B 1B9, or by telephone at 311.

APPLICATION FOR REVISION INFORMATION

REALTY RESIDENTIAL REALTY COMMERCIAL BUSINESS ANNUAL RENTAL VALUE

ASSESSMENT YEAR	ASSESSMENT VALUE \$	ROLL NUMBER
PROPERTY ADDRESS	LEGAL DESCRIPTION LOT BLOCK PLAN	

APPLICATION FOR THE REVISION OF AN ASSESSMENT ROLL WITH RESPECT TO THE FOLLOWING MATTER(S): PLEASE CHECK (✓) APPLICABLE BOX(ES)

AMOUNT OF AN ASSESSED VALUE - SEEKING DECREASE AMOUNT OF AN ASSESSED VALUE - SEEKING INCREASE

CLASSIFICATION OF PROPERTY LIABILITY TO TAXATION

A REFUSAL BY AN ASSESSOR TO AMEND THE ASSESSMENT ROLL UNDER SUBSECTION 13(2) OF THE MUNICIPAL ASSESSMENT ACT

APPLICANT INFORMATION (CHECK APPROPRIATE BOX)

REGISTERED OWNER AGENT (AUTHORIZATION BY OWNER / MORTGAGEE / OCCUPIANT REQUIRED) ASSESSOR MORTGAGEE IN POSSESSION OCCUPIER LIABLE FOR TAXES

REGISTERED OWNER / MORTGAGEE IN POSSESSION / OCCUPIER LIABLE FOR TAXES INFORMATION

NAME / COMPANY (INCLUDING INDIVIDUAL'S NAME / POSITION / TITLE)	MAILING ADDRESS INCLUDING POSTAL CODE
DAYTIME TELEPHONE NUMBER	E-MAIL

PRINT NAME OF _____ SIGNATURE OF _____ DATE _____
OWNER / MORTGAGEE / OCCUPIER OWNER / MORTGAGEE / OCCUPIER

AUTHORIZATION OF AGENT / REPRESENTATIVE INFORMATION (IF APPLICABLE)

I HEREBY AUTHORIZE THE FOLLOWING AGENT / REPRESENTATIVE TO REPRESENT ME IN ALL MATTERS RELATING TO THIS APPLICATION FOR REVISION (THIS AUTHORIZATION EXTENDS TO ANY APPLICATION THAT MAY BE FILED BY THE CITY ASSESSOR WITH RESPECT TO THE ROLL NUMBER FOR THE SAME TIME FRAME)

NAME / COMPANY (INCLUDING INDIVIDUAL'S NAME / POSITION / TITLE)	MAILING ADDRESS INCLUDING POSTAL CODE
DAYTIME TELEPHONE NUMBER	E-MAIL

PRINT NAME OF _____ SIGNATURE OF _____ DATE _____
OWNER / MORTGAGEE / OCCUPIER OWNER / MORTGAGEE / OCCUPIER

NON-REFUNDABLE FILING FEE INFORMATION (FEES ARE SUBJECT TO CHANGE)

SINGLE FAMILY RESIDENTIAL PROPERTIES / RESIDENTIAL CONDOMINIUMS	\$58.00
ALL OTHER PROPERTIES WITH ASSESSED VALUE OF \$599,999 OR LESS	\$58.00
ALL OTHER PROPERTIES WITH ASSESSED VALUE OF BETWEEN \$600,000 AND \$4,999,999	\$11.60 PER \$100,000
ALL OTHER PROPERTIES WITH ASSESSED VALUE OVER \$5,000,000	\$580.00

FILING FEE PAYMENT BY: CASH / DEBIT / VISA / MASTERCARD / AMERICAN EXPRESS / CHEQUE (PAYABLE TO THE CITY OF WINNIPEG)

CREDIT CARD INFORMATION (IF APPLICABLE)

PLEASE CHARGE \$ VISA MASTERCARD AMERICAN EXPRESS

CARD No. EXPIRY DATE

NAME ON CARD SIGNATURE OF CARDHOLDER

5B: Appeals - Municipal Board

Use Case 5B: Appeals - Municipal Board	
BUSINESS SERVICE	Appeals - Municipal Board
DESCRIPTION	Processing and tracking of appeals, following workflow steps. The solution should generate an evidence package for submission to appeal boards and allow easy modification of any pre-defined reports.
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Respond to Appeals filed to the Municipal Board. • Work all appeals in a timely manner. • Provide the Municipal Board with copies of the appeal brief at least 21 calendar days (Rebuttal brief, if necessary, 7 calendar days) before the scheduled hearing date.
USE CASE	<p>Using a current client or test database, show how the proposed solution will manage multiple levels of appeal. For this second level of appeal, The Municipal Board, demonstrate how the system is typically set up and functions to track appeals internally. Please note that an appeal is filed with the Municipal Board with a copy sent to the City. The Municipal Board also manages scheduling the hearing date/time/location.</p> <ul style="list-style-type: none"> • Demonstrate how the proposed solution initiates an appeal workflow once notice is received that a Municipal Board hearing has been filed for a property. • Demonstrate how the proposed solution can be configured to select and print out reports, documents and other material, as defined by the assessor, in preparation for the Municipal Board hearing. • Demonstrate how the proposed solution manages documents, requests for information and property agents. • Demonstrate how the proposed solution helps your current clients with managing, reducing and/or defending appeals. <p>Critical Steps:</p> <ul style="list-style-type: none"> • Process Inputs: Receive appeal notices from Municipal Board. • Compile relevant documents for appeal as determined by assessor. • Request data from property owner/agent and track as part of the appeal file. • Enter final adjudication of appeal into system and process as required.

	<p><u>Documents:</u></p> <p>Included is an application to file an appeal with the Municipal Board. This will provide background data on the depth and breadth of data being collected during this level of appeal</p> <ul style="list-style-type: none"> • Notice of appeal.pdf
<p>EXPECTED OUTCOME</p>	<ul style="list-style-type: none"> • Show how the proposed solution uses workflow to manage appeal cases across the various property types (Residential, Commercial, Business, etc.). • Show how the proposed solution have different brief templates, standard templates and then those that conform with the standards of professional appraisal practice (CUSPAP) • Show how the proposed solution can generate demand requests and demands for information from the property owner and how it captures dates related to these requests. • Show how appeal data including filing dates, reasons, and desired value are captured. • Show how you track if a property is being represented by someone who is not the owner and show where you would capture this data. • Show how the proposed solution generates an automated appeal brief. <ul style="list-style-type: none"> ○ Show how you can modify the appeal brief. <ul style="list-style-type: none"> ▪ Show how you can have different appeal briefs by year. ○ Show how you select sales or rental properties for use in appeals. • Show a map of appeals using GIS integration. <ul style="list-style-type: none"> ○ Map all comparable properties to subject in appeal brief • Show how final Municipal Board decisions are captured and processed. • Show how the proposed solution captures electronic signatures for settlement & waiver documents.

FORM 1
NOTICE OF APPEAL

Municipal Board File #:
(To be assigned by The Municipal Board)

Appellant:

Name:

Mailing Address:

Phone #:

Fax #:

e-mail address:
(optional)

Property under Appeal:

Owner:
(if different than the Appellant)

Roll #:

Address or
Legal Description:

Municipality:

Assessed Value:

Classification:

Business Assessment:

Supplementary Assessment:
(effective date(s)):

(As ordered by the Board of Revision)

Subject of Appeal: (check all that apply)

Assessed Value Classification Business Assessment Supplementary Assessment

Year(s) under Appeal:

Grounds of Appeal: (briefly describe the reasons for each matter under appeal)

Type of Property (optional)

Apartment Industrial Residential Shopping Centre Warehouse
 Hotel Office Senior's Complex Strip Mall Other

Date

Appellant or Appellant's Agent

6: Reporting and Querying

Use Case 6: Reporting and Querying	
BUSINESS SERVICE	Reporting and Querying
DESCRIPTION	<p>“Report”: An organized, formatted display of the results of a query; ready for presentation.</p> <p>“Query”: The raw data results of a question posed to the database; more informal than a report.</p> <p>Managing and running queries and reports to facilitate the day-to-day business and the requirements of the annual assessment cycle. These can be run on a single parcel, the entire inventory of the jurisdiction, or a subset of the inventory, for a single year or for multiple years.</p>
KEY BUSINESS GOALS	<ul style="list-style-type: none"> • Ability for all users to create, run, save, and share their own queries using a simple, no-coding user interface. • Ability to create complex queries using coding (SQL preferred). • Ability to create, share, run, schedule, save, modify, and print various reports, ranging from single-property to all properties (including single- or multi-year). • Produce printed copies of all documents and reports necessary to run the business. • Capability to run queries and reports on demand, on a schedule, and dynamically (e.g., dashboards). Regardless of the run method, they should return up-to-date data. • Production of the annual assessment and tax rolls, preview letters, assessment notices and amendments, provincial assessment reports, and other documents, notices, and reports necessary for the day-to-day business, statutory reporting requirements, and the assessment cycle. • Ability to apply security roles and corresponding restrictions to data that can be queried and queries/reports that can be created, run, and/or modified.

USE CASE

Using a client or test database, demonstrate how your proposed solution manages reporting and querying.

- Demonstrate the report-building tool, focusing on the following:
 - How reports are run. Is this directly against the live database or is there a specific report dataset that is created for this purpose?
 - How reports are typically created in the proposed solution (tools typically used).
 - How you would schedule a report to run in batch (i.e., an entire neighborhood or the whole jurisdiction).
 - How you would run a report for a single property (i.e., property record card).
 - Ease-of-use
 - Ability to include any field from the system and (if possible) from satellite (e.g., MANTA) and external (e.g., MLS) systems
 - Report-specific capabilities (e.g., formatting, calculations, statistics)
 - Building and displaying dashboards
- Demonstrate that the proposed solution has an intuitive query toolset that allows appraisal staff to create and run their own queries without intervention from IT staff (can you query any field in the proposed solution?), with an emphasis on the following:
 - Ease-of-use
 - The ability to include fields from satellite systems or external systems (e.g., Tax Billing and Collection, MLS, etc.)
 - Results display (tables, graphs, charts, maps)
 - Ability to save, share, and modify queries
 - Ability to save in various formats (ex: .xlsx, .csv, .docx, .pdf) or print query results
- Demonstrate more complex queries that can be created using SQL (or similar).
- Demonstrate the creation of automated or templated documents and reports. Examples could be an automated appeal brief or an automated sales verification letter.
- Discuss print management functions if applicable.
- Discuss role-based set-up and other security functions of the reporting toolset.
- Demonstrate how to modify a report (i.e., adding a new field to a comparable sales report).

**EXPECTED
OUTCOME**

- Overview of the tools that are typically used to create reports in the proposed solution (PowerBI, IBM Cognos, Tableau, etc.).
- All major reporting requirements are met using the proposed solution. (A sample list of reports in the following section.)
- The product is designed in such a way that batch reports can run against the entire database efficiently (timing to run entire assessment roll).
- The reporting solution is capable of generating charts and graphs.
- Report templates can be easily updated/changed with little or no intervention from IT staff.
- Outline of how reporting capabilities are tied to a user role. What parameters are in place to ensure only qualified employees are running batch reports, etc.?
- The system can query any of the fields available in the proposed solution.
- Users can create and save their own queries and share them with other users.
- An interface (drag and drop/steps/prompts, etc.) allows filtering and sorting without requiring coding/programming language knowledge.
- More complex queries can be created using SQL, primarily by IT and Modeling.
- Fields from satellite systems (e.g., MANTA, ODC, AACs) or external sources (e.g., MLS, other City departments) can be integrated
- Queries/reports can be created and made available to all users or users of a certain role (with limited availability based on roles).
- An automated appeal brief can be built within the proposed solution.
- Query results and other reports can be viewed in various formats (e.g., tables, graphs, charts, maps, etc.).
- Reports can be extracted from the system into common formats (.xlsx, .csv, .pdf, .docx, etc.).
- The proposed solution includes dashboards (with the ability to design/create new ones) for analyzing individual parcels (e.g., building information from multiple buildings) and groups of parcels (e.g., Assessment-to-Sale Ratio data for residential parcels in a certain market region).
- Individuals with prescribed roles can run reports/queries on activity data.
- External users have basic access for obtaining information from our system, with emphasis on high-security measures and restricted access (e.g., OpenData portal, website).

REPORTS

Certain reports will be required before go-live. These reports include, but are not limited to, the following:

- Real Property Assessment Roll
- Business Property Assessment Roll
- Personal Property Assessment Roll
- Assessment Preview Letters
- Assessment Notices (Real Property, Business, Personal Property)
- Board of Revision Briefs
 - Commercial Property
 - Cost Property
 - Hotel
 - Multifamily
 - Business Assessment
 - Condominium
 - Residential
 - Vacant Land
- Comparable Sales Report
- Commercial Cost Report
- Income Report
- Property Record Card
- Income and Expense Questionnaires
- Sales Verification Questionnaires
- Request for information letters
- Percentage Change Reports
- Sales Ratio Report
- Audit Trail Report