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to the challenges of modern world"

**Using Technology in Real Property Practices and Sustainable Cities.  
The Cape Town Case Study (7459)**

**Gasant Jacobs (South Africa)**

**FIG WORKING WEEK 2015**  
**17-21 MAY SOFIA BULGARIA**

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### Agenda

- Introduction and Overview
- Background – The City of Cape Town
- The Valuation Process
- The framework for success: Sustainability, Scalability and Security
- Outcome and achievements
- Conclusion and Questions



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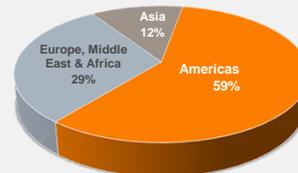


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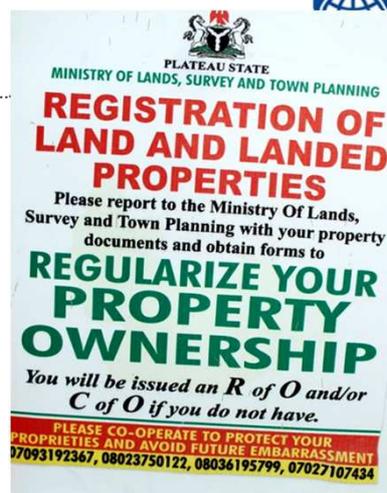
TAX & ACCOUNTING



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## OUR APPROACH...

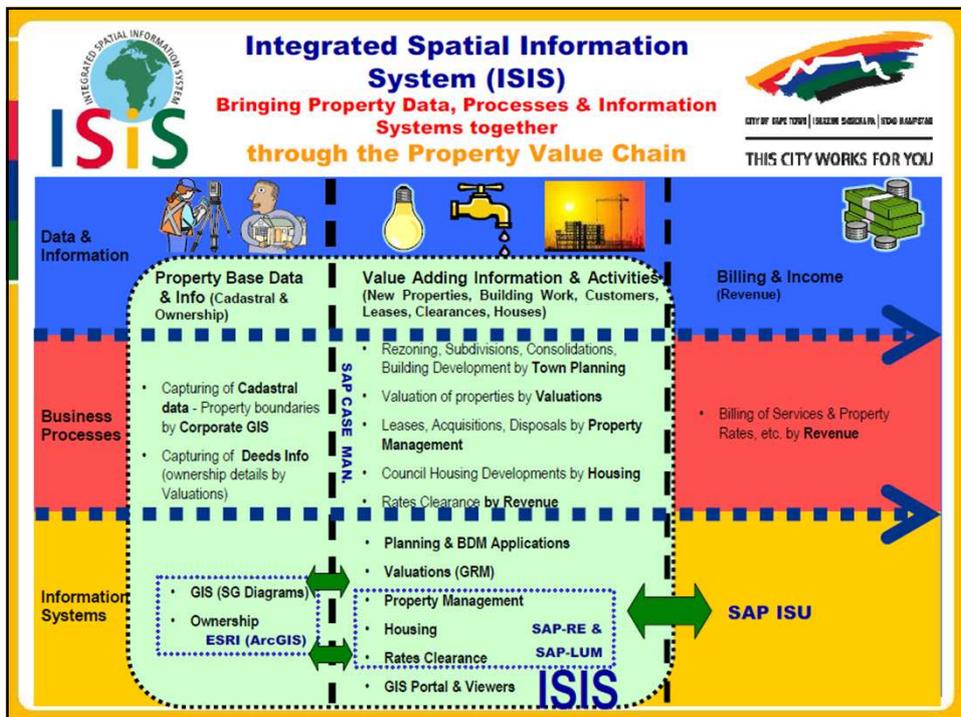
- TR provides the technology, which is the Aumentum platform...
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**Slide 6**

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**U8** Stress partnerships with localities  
U0094360; 25-11-2014





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## 2014/2015 BUDGET

The 2014/2015 Operating Budget is based on generating R 5.93 billion from Property Tax

### Budget at a glance

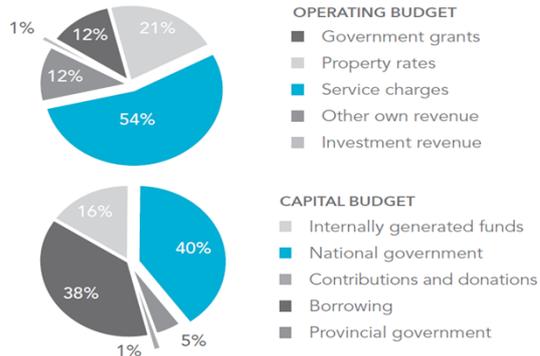
The operating budget is dedicated to day-to-day operations, which include the provision of services such as health, transport and roads, libraries, parks, early childhood development, policing, traffic management, water, electricity and refuse removal.

**2014/15 operating budget:** R28,655 billion

The capital budget is dedicated to the provision of new infrastructure projects and the renewal or capital maintenance of existing assets.

**2014/15 capital budget:** R6,211 billion

### How is this funded?



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## TAX BASE IN THE CITY OF CAPE TOWN

Description	No of Properties
Residential Freehold	571 454
Non Residential Freehold	25 446
Sectional Title	168 605
Vacant Land & Informal	58 003
Agricultural	3 731
Public Service Infrastructure	896
<b>TOTAL</b>	<b>828 135</b>



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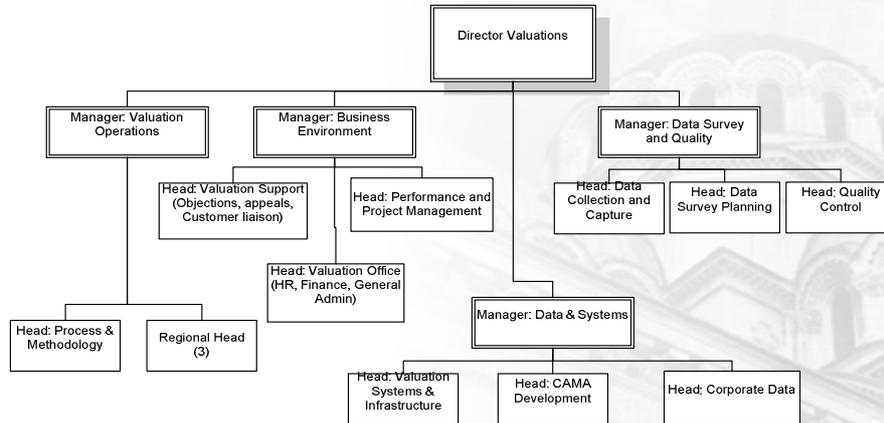




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## ORGANISATIONAL STRUCTURE



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## MANAGERIAL SECTIONS WITHIN VALUATIONS

### Data Survey and Quality (VSQ)

**Purpose:** Responsible to ensure that current valuation attribute data for all registered properties is reflected in the valuation database.

#### Functions:

- ❖ **Plan and prepare for data collection:**
  - Work density analysis, resource balancing & workflow routing;
- ❖ **Data collection and capturing:**
  - Remote data survey;
  - Field data survey; and
- ❖ **Data quality assurance:**
  - Quality control sample methodology & planning;
  - Quality control surveys;
  - Root cause analysis;



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## MANAGERIAL SECTIONS WITHIN VALUATIONS

### Valuations Operations (ValOps)

**Purpose:** Responsible for the execution of General and Supplementary Valuations, Objection Resolution and attending to Appeals

#### Functions:

- ❖ **Prepare for valuations:**
  - Review methodology and specifications for GV's ;
  - Neighbourhood delineation;
  - Market Analysis and market reports (non-residential);
  - Sales Review; and
- ❖ **Manual Valuation of Property:**
  - Valuation of Property; and
  - Quality Control and Capturing of Values.
- ❖ **Value Review and Finalisation:**
  - Value Review CAMA model candidates;
  - Capture amended values; and
  - Finalisation of values.
- ❖ **Resolution of objections and appeals**



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## MANAGERIAL SECTIONS WITHIN VALUATIONS

### Data and Systems (IT&S)

**Purpose:** Responsible to provide a CAMA Service and specialist IT support to the Directorate.

#### Functions:

- ❖ **Managing Data & Systems Interfaces for Valuations base data**
  - Importing of base data;
  - Export of valuation output; and
  - Provide Valuation layer information (GIS).
- ❖ **Maintaining Systems and Infrastructure**
  - Evaluate Systems;
  - Technical Systems Support; and
  - Data Analysis and reporting.
- ❖ **Build and application of CAMA models**
  - Region delineation;
  - Data analysis/sales analysis;
  - Constructing of models; and
  - CAMA model application.



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## MANAGERIAL SECTIONS WITHIN VALUATIONS

### Business Environment (BE)

**Purpose: Responsible to provide specialised support to the valuation processes and general support to the Directorate.**

#### Functions:

- ❖ Communication with regards to the Valuations roll.
  - Compliance with legislative requirements in terms of official valuation notices;
- ❖ Provide the administrative support function to the objection process
  - Capturing of objection forms in system;
  - Administer board hearings; and
- ❖ Managing the General enquiries with regards to Valuations (C3)



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## MANAGERIAL SECTIONS WITHIN VALUATIONS

### Business Environment (BE)

#### Functions Continued:

- ❖ HR Support
  - Provide a support function with regards to recruitment and selection and grievance issues;
  - Co-ordinate and facilitate WPSP and OH&S;
- ❖ Finance Support
  - Compile and administer annual operating and capital budget;
  - Prepare operational tariffs;
  - Administer the payment of all CVO expenditure;
  - Asset Management;
- ❖ Co-ordination of Performance Management Framework
- ❖ Project Management
  - Business & Process Improvement Projects; and
  - GV & SV project management
- ❖ Procurement of Vendors and Contract Management.

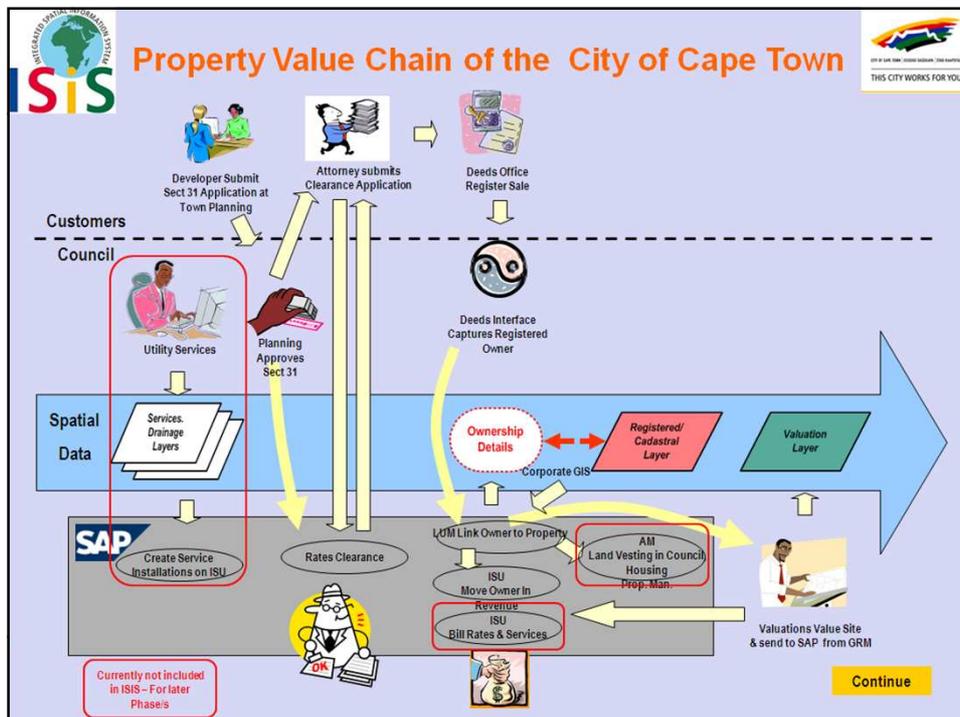


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# Valuation Processes

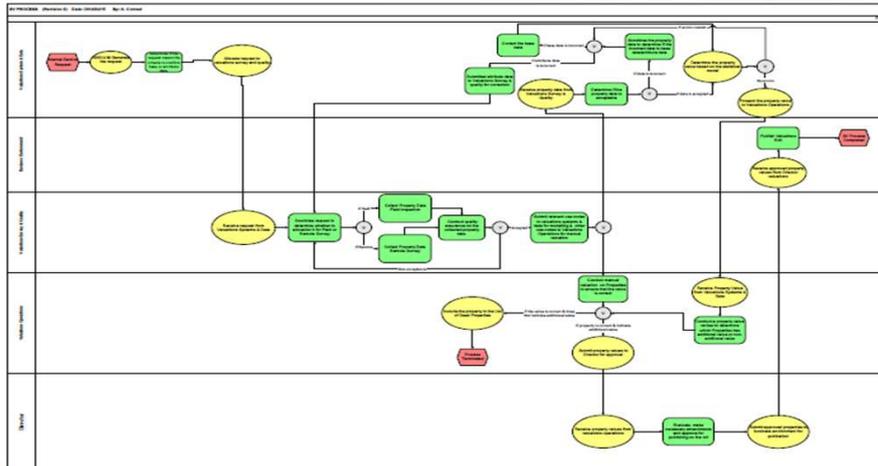




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## VALUATION PROCESSES



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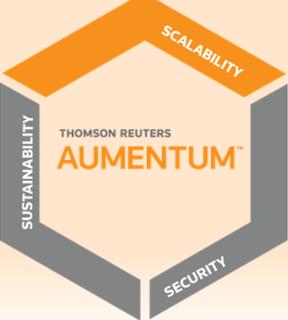
## 3S : The Framework for Success



**Slide 20**

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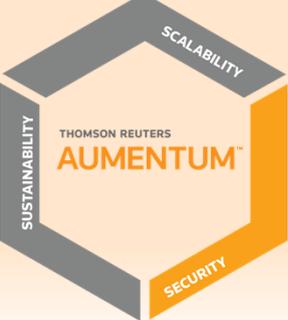
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SUSTAINABILITY  
SCALABILITY  
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## Slide 21

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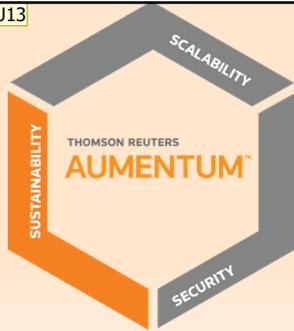
- U10** Too much copy on the image limit it to the main graphic and image that supports it  
U0094360; 25-11-2014
- U11** Change background picture - Something that highlight the transformation between old to new technology. Maybe an African person (traditional dress) using a state-of-the-art equipment (intelligent phone, transforming an old computer to a new ICT system)  
U0094360; 03-12-2014

## Slide 22

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- U12** U0094360 11/25/2014  
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U13



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## 3S DELIVERED



## Slide 23

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"It took us almost 5 months to start processing the Objections that property owners lodged. Now, we can resolve Objections within 30 days."



**Christopher Gavor.**  
Ghanaian National working as the Director for Valuations in Cape Town.



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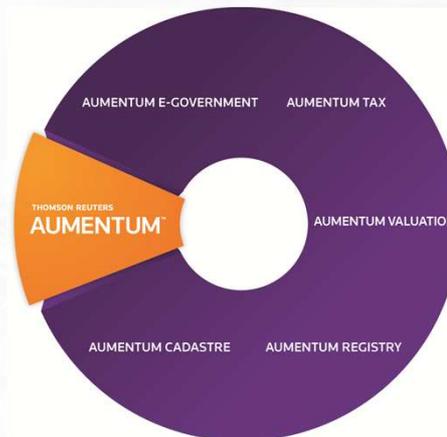
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## Thank You

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