

*"Superb course! It was very professional and academic.
Great variety of topics that are related to each other.
This course has expanded my thinking, both in my
professional and personal writing."*

Melissa Vanderzande, August 2014



The Osgoode-IPTI Certificate Writing Expert Reports in Property Valuation Disputes

A comprehensive "learn-by-doing" program on how to draft professional and effective expert valuation reports for tribunal and court proceedings.

May 20-22, 2015 | Toronto, Canada



Why You Should Attend

More than ever before, the testimony of expert witnesses in court and tribunal proceedings is questioned and scrutinized. At the same time, however, proceedings are increasing in complexity and there is an increased reliance on expert testimony – in both oral and written forms.

For expert witnesses in property valuation disputes, the ability to draft a clear, competent and cohesive expert report is critical. Writing expert reports for a court or administrative proceeding can be as, if not more important as oral testimony. Your written report is meant to provide a strong and concise opinion that should assist in resolution of the dispute, it should also reflect positively on your credibility and expertise.

Created by the developers of the The *Osgoode-IPTI* Certificate in Expert Evidence in Property Valuation Disputes, The *Osgoode-IPTI* Certificate in Writing Expert Reports in Property Valuation Disputes will take your skills to the next level. Learn from top lawyers, adjudicators, and experts who will share knowledge and tips gained from extensive experience drafting, evaluating and reading expert reports.

Successful completion of the Certificate will equip you with the skills you need to ensure your reports are drafted with the precision and clarity expected of an expert, while also reinforcing their compliance with statutory and regulatory requirements. You'll be fully prepared to successfully navigate around the potential pitfalls that can undermine both your opinion, and your professional reputation.

Space is limited and early registration is recommended.

Register now by visiting www.osgoodepd.ca, calling 416.597.9724 or 1.888.923.3394, emailing osgoodepd@osgoode.yorku.ca or faxing 416.597.9736.

Attend this program and you will:

- Learn the critical provisions of the *Assessment Act*, *Municipal Act, 2001*, the *Statutory Powers and Procedures Act*, and the basic law of assessment and procedural issues related to expert reports
- Understand the expert's duties to the court or tribunal, and the often complex relationship with parties and counsel
- Understand the processes and procedures of the Assessment Review Board, particularly as they relate to expert reports
- Know how to identify the elements of an expert report that are most important to a judge or tribunal
- Comprehend the USPAP/CUSPAP rules as they relate to expert report writing
- Recognize and apply the distinction between opinion evidence and advocacy
- Appreciate the importance of plain language when drafting clear and concise reports
- Learn how to work effectively with counsel without sacrificing objectivity in the report writing process
- Be able to identify and address assumptions, alternate possible assumptions, and limitations in relation to an expert report
- Be able to effectively critique and draft an appraisal report
- Obtain critical drafting skills and effective writing tips for creating valuation reports to be used as expert evidence

PROGRAM DIRECTOR

Kenneth West, C.S.
Walker West Longo LLP

ADVISORY BOARD

Robert Butterworth, Q.C.
Walker West Longo LLP

Jerry Grad
CEO, International
Property Tax Institute (IPTI)

Jane Griesdorf
The Writing Consultants

Larry Hummel
Chief Assessor, Municipal Property
Assessment Corporation

The Hon. Justice Peter Lauwers
Ontario Court of Appeal

"Great speakers – extremely knowledgeable. Feel like they got the 'cream of the crop' presenters."

Kathryn Cole

"As with the Expert Witness Program [the Certificate in Expert Evidence in Property Valuation Disputes], all presenters are highly qualified and good educators."

Frazer Pearson

Agenda

Day 1 – May 20, 2015 Introduction and Guidance on Report Writing

8:30 Registration and Continental Breakfast

9:00 Welcome, Introduction and Overview

9:15 **Keynote Address:**
“The Importance of Writing Effective Expert Reports”

The. Hon. Justice Peter Lauwers
Ontario Court of Appeal

After many years on the bench and in practice, Justice Lauwers has seen hundreds of written reports and legal arguments. In this opening address, he will speak to why it is so important that experts take the time to ensure their reports are done properly.

10:00 **Background Principles**

Kenneth West, C.S., Walker West Longo LLP

In order to understand how to write an expert valuation report, one must understand the fundamentals of being an expert and the critical aspects of a valuation expert report. This session will address:

- Experts and reports
- Legislative scheme, legal basics
- Form 53
- Ethical obligations

11:00 **Refreshment Break**

11:15 **What Makes a Good Report – View from an Assessor/Appraiser**

Paul Sanderson, President, International Property Tax Institute (IPTI)

This session will focus on what an “appraiser’s appraiser” looks for when reviewing a valuation report, both as an appraisal and as an expert witness report.

12:15 **Luncheon**

1:15 **What Makes a Good Report – View from the Appraisal Institute of Canada (AIC)**

Nathalie Roy-Patenaude, AACI, P.App
Director-Counsellor, Professional Practice
Appraisal Institute of Canada

The Appraisal Institute of Canada (AIC) is a leading real property valuation association and is a self-regulating organization that is guided by a Code of Ethics, Rules of Professional Conduct, and Canadian Uniform Standards of Professional Appraisal Practice (CUSPAP). Topics covered include:

- Canadian Uniform Standards of Professional Appraisal Practice (CUSPAP)
 - what are the standards of practice?
 - ethical and appraisal review standards when forming a written opinion of value
 - how to maintain the highest level of integrity and professionalism

2:00 **What Makes a Good Report – View from a Lawyer**

Jack Walker, Q.C., Walker West Longo LLP

- What the lawyer is looking for in an expert report
- The borderline between the advocate and the experts
- How experts can work effectively with counsel
- Common pitfalls to avoid
- Strategic communications and tactics

3:00 **Refreshment Break**

3:15 **What Makes a Good Report – View from the Board**

Paul Muldoon, Associate Chair, Assessment Review Board

- What is a Board Member looking for in a written report?
- What is *required* in the written report?
- Tips and techniques tribunals prefer when receiving and evaluating expert reports
- Common bugbears to avoid

4:00 **Day 1 Adjourns**

> Who Should Attend

- Property Valuers
- Property Assessors
- Valuation and Property Assessment Consultants
- Property Tax Consultants

> Mode of Evaluation

In order to be issued the IPTI/Osgoode Certificate, participants will need to attend all modules of the program, complete the in-class workshops and pass a written assessment (administered on Day 3).

Agenda

Day 2 – May 21, 2015 Improving Report Writing Style & Practical Exercise

8:30 Registration and Continental Breakfast

9:00 Principles of Persuasive Writing

David Butt, Barrister

Busy professionals have little time for the craft of writing, but are still expected to produce excellent prose. Lawyer and writer David Butt shows how to write well within a demanding schedule. In this session, participants will study the fundamentals of persuasive writing and how to apply these elements to their work. Topics covered include:

- How to recognize and identify your audience
- Mastering the subtext
- The elements of persuasion
- Principle based decision making

10:00 Polish Your Writing Style

Jane Griesdorf, The Writing Consultants

The ability to communicate clearly and correctly in writing is an essential skill. Polished writing can boost your authority and contribute powerfully to the overall impact of your written material. Learn the core principles and mechanics of effective writing and apply them to such areas as

- Document design: fonts, whitespace, headings
- Up-to-date punctuation
- Parallel point form
- High readability through plain language and active verbs
- Paragraph and sentence clarity
- Error-free sentence structure
- Correct use of nouns, pronouns, adjectives, and adverbs
- Correct word usage

Note: A 15 minute break will be taken during this session.

12:45 Luncheon

1:45 Introduction to Report Writing Exercise

Paul Sanderson, President, International Property Tax Institute (IPTI)

A key element of an expert valuation report is knowing how to collect data and marshal it into a digestible form. This session will address the skills required for collecting the right data and using it in a report. This session will also address some of the attributes a successful expert has when preparing the analysis and the written report.

2:15 Drafting the Executive Summary of an Expert Report

Participants will work individually to draft their own executive summary of an expert report. Facilitators will be on hand throughout the session to discuss the issues with the participants.

Note: A 15 minute break will be taken during this session.

4:30 Day 2 Adjourns

Day 3 – May 22, 2015 Feedback on Practical Exercise

8:30 Registration and Continental Breakfast

9:00 Expressing and Supporting Your Opinion

Working in small groups, with the help of facilitators, participants will build on the previous day's sessions and focus on effective methods when writing an expert opinion. Focusing on the draft executive summaries prepared by participants, the small group discussion will further reinforce and strengthen the impact and clarity of written reports.

10:45 Refreshment Break

11:00 Drafting Reports: Lessons Learned

Working in small groups, the Faculty will draw out the lessons learned from the drafting of executive summaries (prepared on Day 2). The focus is on practical advice and guidance that will improve the effectiveness of your expert valuation reports.

12:45 Luncheon

1:45 Panel Session: The Views of Experts

Jack Walker, Q.C., Walker West Longo LLP

Larry Hummel, Chief Assessor, Municipal Property Assessment Corporation

Jerry Grad, Chief Executive Officer, International Property Tax Institute (IPTI)

Counsel and experts with experience in both the public and private sectors will lead an interactive discussion on the key elements of good report writing. This session will also provide an opportunity for participants to ask questions on any aspect of report writing that they would like further information about.

2:45 Refreshment Break

3:00 Written Assessment

3:45 Concluding Comments

Kenneth West, C.S., Walker West Longo LLP

Paul Sanderson, President, International Property Tax Institute (IPTI)

4:15 Certificate Concludes



The *IPTI/Osgoode Certificate Writing Expert Reports in Property Valuation Disputes* draws on the expertise and experience of leading lawyers, adjudicators and experts, including:

David Butt, Barrister

David Campbell
Rogers Partners LLP

Jerry Grad, Chief Executive Officer
International Property Tax Institute (IPTI)

Jane Griesdorf, The Writing Consultants

Larry Hummel, Chief Assessor, Municipal
Property Assessment Corporation

The Hon. Justice Peter Lauwers
Ontario Court of Appeal

Robert Miller, Rueter Scargall Bennett LLP

Paul Muldoon, Associate Chair
Assessment Review Board

Natalie Mullins, Gowling Lafleur
Henderson LLP

Nathalie Roy-Patenaude, AACI, P.App
Director-Counsellor, Professional
Practice, Appraisal Institute of Canada

Paul Sanderson
President, International Property
Tax Institute (IPTI)

Jack Walker, Q.C., Walker West Longo LLP

Kenneth West, C.S., Walker West Longo LLP

Program Details

The program will be held at
Osgoode Professional Development's
Downtown Toronto Conference Centre
1 Dundas Street West, 26th Floor

Day 1

May 20, 2015
9:00 a.m. - 4:00 p.m.

Day 2

May 21, 2015
9:00 a.m. - 4:30 p.m.

Day 3

May 22, 2015
9:00 a.m. - 4:15 p.m.

For further program-related information

Please contact:
Stéphane McRoberts, Program
Lawyer at 416.619.4351 or email
at smcroberts@osgoode.yorku.ca

Osgoode Hall Law School's *Osgoode Professional Development* offers both credit and non-credit programming to meet the life-long learning needs of lawyers and other professionals who need legal information. Osgoode Hall Law School is one of the world's pre-eminent law schools. *Osgoode Professional Development* embodies the law school's commitment to meeting the educational needs of the broader community and has offered many continuing legal education programs for health care, law enforcement and other professionals.

The International Property Tax Institute (IPTI) is a not-for-profit organization with a goal to advance and foster property taxation and assessment ideals on an international level. Utilizing its ability to assemble international experts from all facets of the assessment and taxation fields, IPTI assists governments, organizations, corporations, taxpayers and professionals alike to better understand the complex issue of financing local governments, and in particular, the essential role property taxation has in this process. IPTI has been an advocate for the global promotion of sound property taxation and assessment practices, and is dedicated to developing an unparalleled knowledge base in property taxation and assessment.

THE OSGOODE-IPTI CERTIFICATE WRITING EXPERT REPORTS IN PROPERTY VALUATION DISPUTES - SPRING 2015

Space is strictly limited to ensure
hands-on learning and feedback.
Register now!

Name:	Title:								
Firm/Company:	Practice Area:								
Address:									
City:	Province:	Postal Code:							
Email:									
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Fee Per Delegate

\$2,495 plus HST for a total of \$2,819.35.

Group rates: please email smcroberts@osgoode.yorku.ca



PROGRAM ELIGIBLE FOR GOVERNMENT GRANT FUNDING

The Canada-Ontario Job Grant will pay for 2/3 of the program costs for qualified applicants. If approved, this program would cost you \$831.67 plus HST. Learn more at www.osgoodepd.ca/grant

Fees include attendance, program materials, continental breakfast, lunch and refreshments for each of the 3 days of the program. The price does not include accommodations. Please inquire about group discounts and financial assistance. Dress is business casual.

Payment Options – Payment must be made prior to the program

- ☐ Cheque enclosed (payable to York University – GST# R119306736)
☐ Bill my credit card: ☐ VISA ☐ Mastercard

Card# _____

Expiry: _____

Signature: _____

Payment Amount: _____

Cancellations/Rainchecks/Substitutions

If you are unable to attend the program your organization may name a replacement. A full refund will be issued for cancellations received a minimum of 21 days before the program start date. Written cancellations received after April 29, 2015 will be subject to an administration charge of \$700.

Non-attendance or withdrawal after the program start date will incur a full program fee. Payment must be received by May 6, 2015.

Program Changes

We will make every effort to present the certificate program as advertised, but it may be necessary to change the dates, location, speakers or content with little or no notice. In the event of program cancellation, York University and Osgoode Hall Law School's liability is limited to reimbursement of paid fees.



OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSUC.



Eligible CPD/MCLE hours: LSUC (ON): 18.75 CPD Hours (16.0 Substantive, 3.75 Professionalism); NY CLE: 22.5 credit hours in the Area of Professional Practice for transitional and non-transitional lawyers.

OsgoodePD programs may be eligible for CPD/MCLE credits in other Canadian jurisdictions. To inquire about credit eligibility, please contact cpd@osgoode.yorku.ca.

For Further Program-Related Information

Please contact: Stéphane McRoberts, Program Lawyer at 416.619.4351 or email smcroberts@osgoode.yorku.ca

Location

Osgoode Professional Development
Downtown Toronto Conference Centre
1 Dundas St. W., 26th Floor
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4 Convenient Ways to Register

1. **MAIL** your registration form to:
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Downtown Toronto Conference Centre
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Toronto, ON M5G 1Z3
2. **ONLINE** at www.osgoodepd.ca
3. **FAX** your registration to 416.597.9736
4. **CALL US** at 416.597.9724 or 1.888.923.3394

