

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

August 15-17, 2017
3 days
In Person

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

Attend this program and you will:

- Understand the expert’s duties to the court or tribunal, and the often complex relationship with parties and counsel
- Know how to identify the elements of an expert report that are most important to a judge or tribunal
- Recognize and apply the distinction between opinion evidence and advocacy
- Appreciate the importance of plain language when drafting clear and concise reports
- Be able to identify and address assumptions, alternate possible assumptions, and limitations in relation to an expert report

Register today at:

osgoodepd.ca/expertreports-ipti

Certificate Details:

PROGRAM DIRECTOR

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

LOCATION

**Osgoode Professional
Development**
1 Dundas St. West, 26th Floor,
Toronto, ON



International Property Tax Institute



Drawing on the expertise and experience of leading lawyers and experts, including:

Program Director



Kenneth West, C.S.,

Walker West Longo LLP

Program Faculty

David Butt

Barrister

Robert Butterworth, Q.C.

Walker West Longo LLP

David Campbell

Rogers Partners LLP

Jerry Grad

Chief Executive Officer, International Property Tax Institute (IPTI)

Jane Griesdorf

The Writing Consultants

Larry Hummel

Director, Assessment Services, International Property Tax Institute (IPTI)

The Hon. Justice Peter Lauwers

Ontario Court of Appeal

Paul Muldoon

Associate Chair, Assessment Review Board

Paul Sanderson

President, International Property Tax Institute (IPTI)

Jack Walker, Q.C.

Walker West Longo LLP

Kenneth West, C.S.

Walker West Longo LLP

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.

Advisory Board

Robert Butterworth, Q.C.

Walker West Longo LLP

Jerry Grad

Chief Executive Officer, International Property Tax Institute (IPTI)

Jane Griesdorf

The Writing Consultants

Larry Hummel

Director, Assessment Services, International Property Tax Institute (IPTI)

The Hon. Justice Peter Lauwers

Ontario Court of Appeal

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

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 help in resolving the dispute, it should also reflect positively on your credibility and expertise.

Created by the developers of 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.

What You Will Learn

- 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 processes and procedures of the Assessment Review Board, particularly as they relate to expert reports
- Comprehend the USPAP/CUSPAP rules as they relate to expert report writing
- Learn how to work effectively with counsel without sacrificing objectivity in the report writing process
- 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

Who Should Attend?

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



Agenda

Day 1 – Tuesday, August 15, 2017

Introduction and Guidance on Report Writing

8:30

Registration and Continental Breakfast

9:00

Welcome, Introduction and Overview

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

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

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)

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 communication 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

Day 2 – Wednesday, August 16, 2017

Improving Report Writing Style & Practical Exercise

8:30

Registration and Continental Breakfast

9:00

Effective Writing for Professionals

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

Agenda

11:15

Refreshment Break

11:30

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

12:30

Luncheon

1:30

Introduction to Report Writing Exercise

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

A key element of an expert valuation 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.

2:00

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.

4:00

Day 2 Adjourns

Day 3 – Thursday, August 17, 2017

Feedback on Practical Exercises

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 clarify 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. 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

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

Larry Hummel, Director, Assessment Services, International Property Tax Institute (IPTI)

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

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

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

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

4:00

Certificate Concludes

Mode of Evaluation

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

Our participants say it best:

“The speakers were all informative and very good.”

Jim McAdam (May 2015)

“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)

“Great speakers – extremely knowledgeable. Feel like they got the ‘cream of the crop’ presenters.”

Kathryn Cole (February 2014)

“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 (February 2014)

Registration Details

Fee per Delegate \$2,495 plus HST

Government Rate \$1,995 plus HST

Fees include attendance, program materials, continental breakfast, lunch and break refreshments. Group discounts are available. Visit www.osgoodepd.ca/group-discounts for details. Please inquire about financial assistance.

Program Changes

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

Cancellations and Substitutions

Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 21 days prior to the program date. If a cancellation request is made with less than 21 days notice, a \$150 administration fee will apply. No other refund is available.

For Further Program-Related Information please contact:

Stéphane McRoberts, Program Lawyer at (416) 619-4351 or email smcroberts@osgoode.yorku.ca.

Certificate of Program Completion

You will receive a certificate upon completion of The *Osgoode-IPTI* Certificate in Writing Expert Reports in Property Valuation Disputes. Participants must attend all program days and pass the post-program multiple choice assessment to receive a certificate.

4 Convenient Ways to Register



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