



**Assessment Review Board**

**Practice Direction on Settlement Conferences - Updated**

**Effective April 1, 2021**

**Background**

The purpose of this Practice Direction is to describe the Settlement Conference process, and to outline how the parties are to participate in a Settlement Conference.

**Procedure**

Pursuant to Rules 56 through 59, a Settlement Conference is an appearance before the Board prior to the scheduling of a hearing, where the Presiding Board Member will meet with the parties to review the issues in dispute, in order to clarify and attempt to resolve some or all of the issues.

If there are unresolved issues, the Presiding Member will schedule a full hearing for the remaining issues to be adjudicated. At a Settlement Conference, the Presiding Member will focus primarily on the legal issues raised in the appeal. Settlement Conferences are beneficial, in that it affords the parties an opportunity to explore their underlying interests, which may be broader than the legal issues to be addressed in a hearing before the Board. Parties may benefit to the settlement conferences to negotiate items such as:

- the issues or evidence are complex or voluminous;
- there are multiple parties to an appeal; or
- there are multiple appeals in respect of a property that are being heard at the same time.

Once the settlement conference has concluded and the appeals have not resolved, the Presiding Member will give procedural directions for the scheduling of the hearing, the exchange of witness statements, and any other directions to ensure the just, most expeditious and least expensive determination of every proceeding.

## **Requirement to Serve and File a Settlement Conference Brief**

Under the applicable Schedule of Events, before the Board will conduct a Settlement Conference, each party will be required to file its pleadings (Statement of Issues, Statement of Response, or Reply) and all documents on which the party intends to rely if the appeal proceeds to a hearing. For a settlement conference, each party is also required to serve on all other parties, and file with the Board, a brief outlining:

- the issues in dispute;
- the party's position on each issue; and
- an explanation of the reasons why the parties have adopted different positions on the issue.

For example, if the appeal is pursuant to s.40 of the *Assessment Act*, where the issue in dispute is the correct current value of the property under appeal, it is not sufficient for the parties to each simply state their conclusion as to what the current value should be. They also need to further clarify the specific issues to be addressed by the Board, by explaining precisely how their underlying assessments of property value differ, e.g. each party applied a different capitalization rate or fair market rent, or made different assumptions respecting functional or economic obsolescence, etc.

## **Settlement Conference is a Confidential Hearing Event**

The Settlement Conference is confidential. Pursuant to Rule 58, by participating in a settlement conference, all parties undertake to maintain confidentiality and non-disclosure in respect of the settlement conference. Pursuant to Rule 59, a Board Member who presides over a Settlement Conference will not be assigned as the adjudicator conducting the hearing of the appeal.

Pursuant to Rule 59, a Board Member who presides over a Settlement Conference will only be assigned to conduct the subsequent hearing, with consent of the parties and the approval of the Board.