

Assessment Review Board Update
Progress on Recommendations arising from report PFC2018-1222

Recommendation	Status	Update
Reinstate public annual performance reporting and publish on website (metrics and KPIs)	In progress	The Assessment Review Board (ARB) published a 2018 annual report that is available for review on its website (calgaryarb.ca). Enhancement of future annual reports with metrics tied to key performance indicators, is planned for 2019.
Improve ARB's [Queen's Bench litigation] tracking and reporting	In progress	Improvements have been made to the ARB's litigation tracking and [internal] reporting process. The services of a paralegal have been engaged in part to coordinate this tracking and reporting with the ARB clerks, and in collaboration with the ARB's independent legal counsel.
Participate with parties in streamlining workloads and schedules [the Assessment Business Unit (ABU), ARB, taxpayers & agents] associated with roll preparation and dispute resolution	In progress	A new scheduling process for Composite ARB hearings (non-residential complaints) was implemented in 2019 by the City Clerk's Office, in their capacity as clerks of the ARB. The scheduling process allows for the ABU and tax agents to make joint scheduling recommendations to the Clerk of the ARB.
Develop a process for ABU and tax agents to recommend scheduling to ARB (Edmonton model)		The City Clerk's Office, ABU and tax agents are participating in discussions to identify further opportunities for improving consensus-based scheduling for ARB hearings in 2020.
Support cooperative practices between the parties to provide maximum flexibility for scheduling and pre-hearing dispute resolution, while respecting principles of administrative law.		Further information about efforts to explore options for the ARB to facilitate dispute resolution is set out below.
Enhance communications strategy to better target timely messages to critical audiences	In progress	Customer Service and Communications has been engaged to facilitate a review of the ARB website by the Board and the City Clerk's Office.
Explore use of plain language (less technical and legal) to explain assessments, simplify dispute resolution and improve public understanding		Further work on communications strategy is required to ensure the timely and adequate engagement of stakeholders, and will be led by the City Clerk's Office in Q1 2020.

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Investigate for adoption Rules of Practice & Procedure to incorporate active appeal management, dispute resolution and settlement conferencing	In progress	The ARB has begun working with other municipal and provincial tribunals to explore best practices in dispute resolution in other jurisdictions, and to identify legislative amendments which may be required to expand the mandates of assessment review boards to participate in or facilitate dispute resolution processes.
The City advocate for legislative change to introduce dispute resolution alternatives (e.g., structure appeal management and mediation, single member adjudication (by hearing or written submissions) drawing from and adapting experience of jurisdictions like British Columbia, Manitoba (City of Winnipeg) and Ontario.	To be commenced	The City Clerk's Office will lead this effort for implementing ARB cost reporting in 2020.
ABU and ARB include cost reporting on complaint and appeal processes in performance management	To be commenced	
Investigate the business case for board officer positions (like the Edmonton model)	Completed	The ARB launched an enhanced performance review process for members in Q4 2018.
Enhance the ARB member performance review process (Edmonton model)	In progress	In 2019, the ARB has instituted a pre-hearing review of assessment review files by the panels to narrow and focus issues and improve the efficiency of the hearing process.
Adopt the use of case management by Board members to narrow issues and encourage prehearing resolutions		Further, the ARB will continue to explore options for expanding its legislated mandate, to ensure that it may apply appropriate dispute resolution processes in any proceeding.
Publicize ARB practices regarding training and qualifications of members; requirements for 'cooling off' periods for candidate members between employment as assessors and appointment as ARB panel members	Complete	ARB member qualifications, member training requirements and 'cooling off period' for candidates are publicized on the ARB website. Further information about Alberta Municipal Government Board (MGB) members who preside over Calgary CARB panels is available on the MGB website.

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Clarify ARB's adjudication role; streamline / simplify and transfer administrative functions to City Clerk's office	Complete	Scheduling of ARB hearings for 2019 was transitioned to the City Clerk's Office.
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