ALBERTA REAL ESTATE FOUNDATION

Farm, Ranch and Acreage Property Program

Needs Assessment

December 2004

Learning

Enhancement
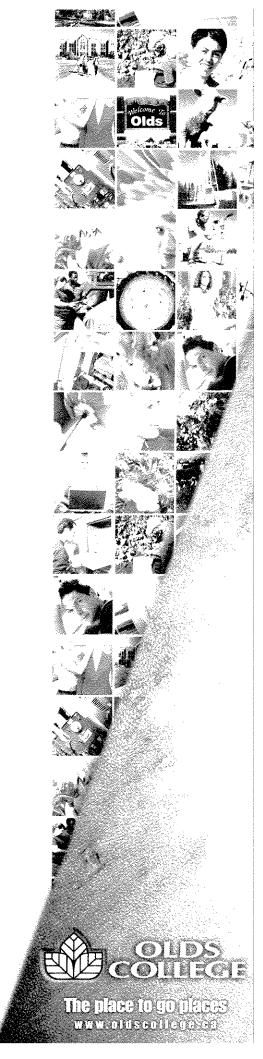
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ALBERTA REAL ESTATE FOUNDATION FUNDED FARM, RANCH AND ACREAGE PROPERTY PROGRAM REDEVELOPMENT PROJECT
PHASE I
EXECUTIVE SUMMARY

BACKGROUND

Olds College entered into a contract with the Board of Governors of the Alberta Real Estate Foundation to complete Phase One of the redevelopment of the Farm, Ranch, and Acreage Property (FRAP) Program.

Gael MacLeod, Executive Director, Alberta Real Estate Foundation; Cathy Edge, Coordinator of Licensing Education, Alberta Real Estate Association; and Bill Fowler CAE, Commercial Division Manager CREB served as the Industry contacts for this project. Chuck Howard, Coordinator Learning enhancement Services; and Mary Jane Van Soest, Extension Project Manager, were the Olds College project managers. The Olds College Learning Enhancement Services team facilitated the processes associated with Phase One.

Early in October of 2004 the Learning Enhancement Services (LES) team met with Bill Fowler and Cathy Edge to determine the process and objectives for this project. The specific objectives were to:

- Establish an Industry Advisory Committee for the FRAP Program to insure that changes in the rural real estate environment are documented and their impacts on the skills of rural realtors identified. Additionally, to insure that the FRAP Program continues to meet the needs of rural realtors wanting to improve their performance;
- Identify the skills used by successful rural realtors in operating their businesses;
- Validate those skills with a wider audience of rural realtors;
- Develop a program profile identifying the courses required in the program, using the final validated skill profile and working with appropriate content experts;
- Develop learning profiles for each course, in consultation with content experts. These profiles identify what learners must do to complete the FRAP Program.

PROCESS

At an initial meeting with Bill Fowler in October 2004, LES reviewed the proposed process for the project. Successful rural real estate agents in Alberta were identified as the target population for the advisory committee and the needs assessment. Bill indicated that some of the same people identified for the Advisory Committee would be candidates for the needs assessment step in the process. The critical sampling characteristic was to insure geographic representation.

The process, beyond the establishment of the Advisory Committee, involved the following steps:
- Facilitating a telephone survey with a representative sample of successful Alberta rural realtors as identified by Bill Fowler;
- Validating the data collected in the telephone survey with a wider audience of successful Alberta rural realtors;

- Olds College Learning Enhancement instructional designers facilitating appropriate content experts to sort the skills identified and validated in the previous steps into courses and develop a revised FRAP program plan;
- Olds College Learning Enhancement instructional designers facilitating appropriate content experts to develop course profiles for each of the courses identified in the program plan.

Project Activity One – Establish an Industry Advisory Committee for the Farm, Ranch, Acreage Property Program

Membership

The following rural realtors have been contacted and have agreed to participate as a member of the Olds College Industry Advisory Committee for the Farm, Ranch, Acreage Property Training Program:

Vern Moore
Gord Leeson
Michelle Jones
Ruth Smith
Sandi Kennedy
Lorna Evans
Jody Buckle
Perry Phillips
Pat Bedry
Lesley Fleming
Rob Campbell

Terms of Reference

Advisory Committee members will agree to:

1. Attend annual meetings of the Committee;

2. Present an annual report detailing the following information relative to their industry sector that have the potential to impact the skill sets required by Rural Realtors who complete the FRAP Program:

   - Changes in the sector business/working environment;

   - Changes in technology;

   - Changes in policies and regulations;

   - Changes in markets that impact the Rural Real Estate Business.

3. Provide feedback detailing the ability of Realtors that complete the FRAP Program to perform in industry;

4. Support the Olds College curriculum development processes by assisting in the identification of industry experts to serve as needs assessment/occupational analysis/program review participants;

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5. Promote Olds College performance-based training programs in their respective industry sectors.

Meetings

Meetings will be scheduled annually at the convenience of the members of the Committee.
Since several members of the Committee were involved in the needs assessment and two members were involved as content experts on the program and profiling activities of this project, a formal meeting was not scheduled for 2004. The regular meetings will commence in 2005 after the completion of the FRAP Program offering.

Project Activity Two - Skill Needs Assessment of Successful Alberta Rural Realtors

Step 1: Telephone Survey

Population

Bill Fowler provided the names and contact information for successful rural realtors working in Alberta who met the criteria for the target population. In consultation with the client, it was determined that a target of 20 interviews would be sufficient to sample the demographic characteristics of the population.

These contacts were phoned and offered an opportunity for a telephone interview to identify the skills that they used to successfully operate their rural real estate businesses. Once an interview time was scheduled, a brief questionnaire was faxed to the participants to help them to prepare.

Following is a breakdown of the interviews by geographic area:

Interview Participants	
Area	**Number of Interviews**
Northern Alberta	3
Central Alberta	9
Southern Alberta	1
Total	**13**

Instrument/Data Collection

A faxed questionnaire was used to provide a format for the telephone interview and to collect the data for this survey.

The first question was demographic in nature. Next was an open-ended question designed to encourage the rural realtors being interviewed to focus on identifying the skills that they use to successfully operate their business. This data was collected in performance terms, in other words, documenting what skills rural realtors need to perform on the job.

The introductory script and questionnaire, a list of interview participants, and a summary of process notes from the interviews are included in the Validation Survey Appendix.

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Data Analysis

Once interviews were completed, the interview data regarding the skills used by rural realtors were sorted by themed skill categories (bands) and placed into a validation document. This information is included in the Validation Survey appendix.

Step 2: Validation Survey

Population

The validation surveys were distributed to all contacts received from Bill Fowler and other Rural Realtors, including the interview participants. Following is a table indicating the distribution of validation documents to rural realtors in Alberta.

Validation Participants	
Area	**Validation**
Northern Alberta	5
Central Alberta	33
Southern Alberta	4
Total	**42**

Instrument/Data Collection

Needs Assessment – Validation Survey Document

1. Validation of data collected from interview responses to the main focusing question - What skills do you need to successfully operate your Rural Real Estate Business?

Respondents were asked to rank each skill statement relative to the skills they use. A four point Likert-type scale identified as *Critical, Important, Not Important,* or *Not Applicable was provided for participants to use to rank the importance of the skills identified in the interview process relative to their own experience in their business.* Space was provided in the validation document for participants to add skills that had not been identified in the initial interviews, as well as to provide feedback and comments. This validation document was sent, electronically, to participants as an e-mailable form.

Training Logistics Questionnaire

A questionnaire was attached to the survey to obtain feedback regarding the learning preferences of potential participants. This information is useful in making decisions regarding the timing, location and formats of training prior to implementing a training development plan.

All responses to the validation remained anonymous. A copy of the validation document is included in the Validation Survey Appendix.

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Data Analysis

The quantitative data was then compiled. The data was tallied and frequency distributions were computed. A final needs assessment (rural realtors' skills) profile was developed based on the statistical analysis of the data. The profile is contained within the Final Skill Profile Appendix. As well, additional comments from the validation document were compiled and can be found with the final chart. Comments which indicated additional needs were added to the chart (*skills in italics*) as unvalidated skills.

The profile is divided into the same categories as the validation document with the corresponding needs (rural realtors' skills) statements. Based on the responses, the needs statements (rural realtors' skills) were sorted within each category from most to least critical and numbered accordingly (e.g. A1.....A100). Any additional needs identified via the validation document were then coded into the appropriate category (note - appear in italics). These **skill categories (bands)** were then prioritized based on the average of *Critical* and *Important* responses within that category (skill band), and lettered accordingly from A band - most important to F band - least important.

Training logistic responses were tallied and frequency distributions calculated. Summaries of this data are included in the training logistics appendix

RESPONSE RATES

Factors Favoring High Response Rates

Most of the observations are based on response rates to the validation document. It is not unreasonable to extrapolate that response to the validation survey is an indicator of need.

High response rates to a survey may result from a number of factors, including having:

- a personal need for improving performance
- a need for employees to improve performance
- time to fill out survey document
- remembered to fill out the survey document
- given the survey a high priority in their activities
- confidence that action will result from the survey
- experienced positive outcomes from completing surveys
- understood the format of the survey document
- understood the wording in the survey document
- understood and agreed with the purpose of the survey
- no reservations in sharing the information requested
- contact with the surveying organization

While there could be other factors that enter into the decision to participate by completing the validation, our experience indicates that if a potential respondent's need is great enough, he or she will make time to complete and return this document. From our experience, we use 25% return as a benchmark for determining the validity of our surveys at Olds College. This is supported by Statistics Canada's benchmark for determining the validity of their mail-out surveys.

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Response Rates

Validation Response Rates By Area			
Validations	**Sent**	**Received**	**% Received**
Alberta	40	17	42.5%

Needs Assessment Observations

Based on the response rate to the validation survey (42.5%), and using our benchmark of 25% for the population (Alberta Rural Realtors), we would consider the data to be valid.

With regard to the ranking of the importance of the skills used by successful Rural Realtors, the following observations are worth noting:

- The relative order of importance for the groups (bands) of skills is:
    1. Determine attributes of property
    2. Create listings/sales opportunities
    3. Determine price of real property
    4. Process the sale
    5. Consult with the potential buyers
    6. Manage real estate operation

- Within the first ranked band of skills (Determine attributes of property) the top five skills were:
    1. Determine parcel size
    2. Determine property boundaries using maps and landmarks
    3. Locate property in rural area (e.g. range, roads, townships)
    4. Disclose all possible constraints of a property
    5. Determine particulars of property
        - Water sources
        - Potability of water
        - Easements
        - Chemical characteristics
        - Problems with buildings
        - Age of buildings

- Within the second ranked band of skills (Create listings/sales opportunities) the top five skills were:
    1. Establish a rapport with client
    2. Consult with client to asses their objectives for completing the sale
    3. Decline selling property if client refuses to disclose latent defect
    4. Use e-mail to exchange information with client
    5. Determine if client is working with another realtor

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- Within the third ranked band of skills (Determine price of real property) the top five skills were:
    1. Access land titles from Land Titles Office
    2. Search Internet for "actives" and "solds" prices
    3. Assess the value of property within range
    4. Analyze comparable sales
    5. Consult with seller to arrive at realistic price

- Within the fourth ranked band of skills (Process the sale) the top five skills were:
    1. Maintain honesty in transactions:
        - Provide accurate information about a property
        - Admit lack of information and research it
    2. Maintain list of stages of offers:
        - Conditions to be removed by date
        - Completion date
    3. Present counter-offers to buyer
    4. Mediate disagreements between buyer and seller of rural property
    5. Communicate with lawyers

- Within the fifth ranked band of skills (Consult with the potential buyers) the top five skills were:
    1. Disclose latent defects associated with listing
    2. Identify alternative properties to meet client needs
    3. Pre-qualify buyers by finding out their business goals and objectives, associated with the purchase of farm property
    4. Ask sufficient questions to determine real needs of clients
    5. Match client needs with available property

- Within the sixth ranked band of skills (Manage real estate operation) the top five skills were:
    1. Maintain consistency by working for the party with whom you have signed the contract
    2. Use websites to:
        - List properties
        - Promote business
        - Find buyers and future sellers
    3. Manage time:
        - Keep a day timer
        - Maintain balance in life
        - Prioritize duties
        - Maintain personal priorities
        - Set up daily schedule
        - Plan holidays quarterly
    4. Establish a network of specialists who can consult on rural property transactions (e.g. specialized accountant, tax experts)
    5. Advertise listing in:
        - Real estate news publication
        - Classified section of newspaper
        - Personal website
        - Local real estate offices should receive a feature sheet of property

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- Farm publications magazines
- Local newspapers for Rural Real Estate

These observations are provided here to give the reader an overview of the relative importance of skills as ranked by the rural realtors who responded to the validation document. It should be noted that this summary is not to suggest that these are the only important skills used by rural realtors. When it comes to using this data to design training, certainly the entire array of skills identified in the study are taken into consideration by the content experts working in collaboration with an instructional designer.

Training Logistics

Observations

1. Eleven of the seventeen people responding to the validation document indicated an interest in participating in training that results from the needs assessment.
2. About 40% of respondents indicated that the length of the training segments should be one day per week until the training is completed. About a quarter of the respondents indicated two to three days per week until finished.
3. Eleven of the respondents indicated a preference for classroom instruction. There were between 3 and 4 votes for the other format choices provided, which included Internet instruction.
4. Participants indicated their preferences for the month in which training would occur. The top vote-getters, in order of preference, were February, January, November, and December. It is worth noting here that the lowest votes were cast for April, May, June and August.
5. Respondents favor week day training as opposed to weekends or evenings.
6. There was not a strong indication of how far participants were willing to travel to participate in training. One hundred kilometers received the most votes, but that was only a total of five.
7. Ten of the seventeen respondents indicated that they would value certification as a rural realtor upon completion of a training program. No one selected the "no" answer, but seven had no opinion.
8. As for the question about what factors would prevent you or other realtors working in your organization from participating in training, the most common response was time. Cost and distance to travel were also identified as possible barriers. One other concern was expressed related to the thought that this program might become a certification program for rural realtors. "It seems redundant for someone with several years experience in the farm real estate market to be required to do upgrading which would involve exams when that would be the determining factor as to whether or not he could retain his license." There would need to be a prior learning assessment plan available to experienced rural realtors if this program were to become a certification program.

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Project Activity Three: Development of a Program Plan and Associated Course Profiles

Process

Clarence Esau, one of Learning Enhancement Services instructional designers, worked with one of our Extension Programmers, who has a number of years experience in the rural real estate business, to develop a program plan for the FRAP Program. They used the skill profile developed in the previous project activity as a guide to determine what chunks of learning (courses/workshops) would be required to train someone to perform the required job skills. After completing this part of the activity, they proceeded to develop course profiles for each of the courses. These profiles clearly identify what the learner will need to do to successfully complete the workshops. These profiles were validated with two other individuals who are currently successful rural realtors. One of the realtors has been invited to participate as a member of the Olds College Industry Advisory Committee for the FRAP Program.

Deliverables

The Program Plan and the associated Course Profiles are located in the Training Program Profiles appendix.

OBSERVATIONS AND RECOMMENDATIONS

There was a great deal of interest on the part of rural realtors who participated in the different steps associated with Phase One of this project. Everyone that we had contact with was very supportive and we very much appreciate the time that they have committed to the success of this phase of the project. This is one of the major strengths of the process in that it creates a lot of interest on the part of industry stakeholders. They are an integral part of the training development process and the foundation or starting place is the skills that successful Rural Realtors need to use to operate their businesses.

The main recommendation to come out of this phase of the redevelopment of the FRAP Program is that based on the data (skills profile), experienced rural realtors need to continue to be involved in the development and delivery of the FRAP Program. There maybe some need for very specific and focused technical content expertise to complete the learning program, but that technical content needs to be incorporated into the curriculum based on consultations with the rural realtors that are identified to participate in the development of the training program.

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