

Managing Broker Research Project Report

Education and Training: Insights from British Columbia Brokers

Facilitated by the British Columbia Real Estate Association and the Real Estate Brokers Association



BRITISH COLUMBIA
REAL ESTATE
ASSOCIATION

December 2013

With thanks to the many brokers across the province who provided valuable and thoughtful responses to the survey questions and the interviews.

Thanks also to the Real Estate Foundation of British Columbia for funding this research project.



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Executive Summary

This document contains two separate parts:

- The *Managing Broker Research Project Report* covers the first 26 pages and should be read.
- The *Appendices* are for information only. They provide copies of the survey and interview data parsed in a variety of ways. This information is referenced throughout the 26-page report through footnotes to make it easier to find the source of the information in the report. It is not necessary to read through all of the appendices.

The *Managing Broker Research Project Report* presents the results of the online survey, and the face-to-face interviews which were facilitated by the British Columbia Real Estate Association and the Real Estate Brokers Association. The collected data represents the insights and views of real estate brokers across the province.

The goals of the *Managing Broker Research Project* are to provide:

- an analysis of the spectrum of education models in operation in BC brokerages.
- an analysis of possible areas of alignment between the Professional Development Program (PDP) and brokerage education models.
- recommendations for enhancements to the PDP in 2014-2016.

In order to meet these goals, an online survey was sent through the boards to each residential broker in BC. As well, face-to-face interviews were conducted with 47 brokers fairly evenly distributed among the 11 BC real estate boards. A total of 256 brokers participated in the research, representing approximately 24% of all residential brokers in the province.

There were limitations in determining statistically significant trends. The research sample is not a random sample because the survey participants were self-selected, the interviewees were recommended by their boards, and there may be some overlap between those who completed the survey and those who were interviewed. Therefore, the report discusses patterns, trends, and issues rather than statistically significant “facts”.

The report identifies a number of key factors in determining trends including:

- brokerages associated with a brand and those which are independently branded
- owner broker vs. managing broker
- selling vs. non selling broker
- size of brokerage
- brokerage business model
- age level
- geography/location
- resource availability

The report discusses the education models in BC brokerages in relation to these key factors. It also includes broker comments about how they engage and assess learning in their brokerages, and an “Ideal Vision of an Education Model for Licensees”.

The report then provides feedback from the brokers on education alignment between the brokerages and BCREA. The question of who should be conducting the training in hard skills (defined as agency, disclosure, contracts and standard forms, and ethics), soft skills, specialized properties, customer service, and small business skills generated interesting, diverse, and sometimes polarized comments. The report also discusses the question of providing accreditation for in-house training and issues around the implementation of that process. Finally, the brokers provided insight into recommendations for improving the Professional Development Program, including comments on the current funding model and a plan for enhancing PDP to better meet the needs of the brokers themselves.

Throughout the report it is important to note that comments from the surveyed and interviewed brokers reflect the perceptions of the brokers and may or may not reflect the reality of the industry.

The recommendations for moving forward are based on broker insights and focus on PDP improvements, managing broker education needs, and further research requirements. BCREA and REBA will need to review these recommendations internally and with stakeholders to determine next steps.

It is recommended that the:

BCREA should continue to:

- focus on hard skills training (i.e. agency, disclosure, contracts and standard forms, and ethics) and specialized properties but work with boards to address local issues.
- revise PDP courses generally to be more practical, more interactive, and to include accountability and assessment.
- develop learner pathways, particularly in the managing broker stream, to ensure variety and relevance.
- develop more online courses/seminars, particularly for rural communities where access and cost are barriers to participation.

BCREA should consider:

- accrediting training in the secondary skills areas under Category C of the new PDP credit system.
- conducting environmental scans of existing educational resources before embarking on new course development to ensure BCREA does not duplicate existing training.
- making educational resources available on a not-for-credit basis.

BCREA should address managing broker concerns by:

- developing courses that meet brokers’ specific needs.
- providing opportunities for brokers to discuss common issues (seminars, conferences, etc.).
- broadening what counts toward PDP credits for managing brokers under Category C.

- working with REBA and an education institution, such as Sauder School of Business, to develop a more comprehensive training program for new brokers. There is concern that new brokers do not know what to do in the day-to-day operation of their brokerage and there is little training available to support them.

In terms of issues that require further research, it was determined that:

- additional research is needed to identify the preferences of the large urban brokerages in determining the role of BCREA in training secondary competency areas. Because large urban brokerages represent a small number of brokerages province-wide, this is best done through focus groups rather than surveys.
- BCREA should work to clarify preferences and trends in the following areas:
 - the acceptability of the current PDP funding model
 - training related to minimal levels of customer service associated with the REALTOR[®] brand
 - accreditation of in-house brokerage courses for PDP credit
 - succession planning

This is best done by having the BCREA develop concrete proposals to which brokers respond. The responses should come from focus groups representative of brokerage size, region, and branding

As well, it is recommended that REBA should develop an outreach strategy for brokers across the province. There's an interest in REBA but very little knowledge of it or familiarity with it.

Introduction

Project Goals

The goals of the Managing Broker Research Project are to provide:

- an analysis of the spectrum of education models in operation in BC brokerages.
- an analysis of possible areas of alignment between the Professional Development Program (PDP) and brokerage education models.
- a series of recommendations of possible enhancements to the PDP in 2014-2016.

Research Methodology

The research methodology included preliminary interviews with the key stakeholders (i.e., the Task Force members), and some preliminary research into the kinds of online learning available across the province. This assisted in the development of the research questions for the:

- online survey sent through their board to each managing broker/owner in the province.
- face-to-face interviews with managing brokers from each board region.

The survey and interview questions covered largely the same topics. The interviews were designed to delve more deeply into what the Task Force identified as issues through the online survey or interviews. Since the survey participants were self-selected across the province, and the interviewees selected based on their knowledge, experience, size of brokerage, business model, and region; the survey data is used to identify patterns, trends and issues. The interview data provides more in-depth discussion of those patterns, trends, and issues. Where appropriate, the data is combined, particularly in the comments provided by both survey participants and interviewees.

Stakeholders

Project stakeholders include:

- British Columbia Real Estate Association (BCREA)
- Real Estate Brokers Association (REBA)
- member boards
- brokerage houses

Participants

Participants in the research included members of the Task Force and residential managing/owner brokers from across the province.

Task Force

The project Task Force includes representatives from the stakeholders' groups:

- Larry Anderson, FVREB – Owner/Broker, Sutton Premier Realty
- Rick Dubord, REBA – Owner/Broker, Homelife Realty Services
- Marla Gerein, BCREA – Director of Education

- Merrily Hackett, REBA – General Manager, Managing Broker, Sutton Group West Coast Realty
- Andrew S. Leong, REBA – General Manager, Managing Broker, Macdonald Realty Westmar
- Jennifer Lynch, BCREA – Manager, Coast Realty Group (Gabriola Island Office)
- Jennifer Reid, VREB – Manager, Education and Member Services
- Cliff Shillington, REBA – Owner/Broker ReMax (Kelowna)
- Alex Suchy, BCREA – Education Programming Manager

Donna Etheridge (REBGV) is also thanked for her valuable contributions.

Consultants

Research, analysis, and reporting were completed by consultants from Open School BC (OSBC):

- Monique Brewer
- Enid McCauley

Brokers

Participating brokers from each board region completed the survey and participated in the interviews. In total, 203 participated in the survey and 53 were interviewed (including 6 brokers from the Task Force), for a total of 256 participants. Based on the total number of brokers in the province, as submitted by each board, this represents approximately 24% of all the residential brokers in British Columbia.

The following table shows the number of participants by board region, and the percentage of total participants by board region¹:

	Survey	Interviews	Task Force	Total	%
CDREB	6	5		11	4.3
FVREB	21	5	2	28	10.5
REBGV	47	2	2	51	20.3
KDREB	4	5		9	3.5
KREB	9	4		13	5
NBCREB	13	5		18	7
OMREB	27	4	1	32	12.5
PRSCREB	3	3		6	2.3
SOREB	17	5		22	8.6
VIREB	36	4	1	41	16
VREB	20	5		25	10
Total	203	47	6	256	100

The largest percentages of participants were from Greater Vancouver, Vancouver Island, Victoria, and Fraser Valley, followed by Okanagan Mainline. Smaller, more rural regions show fewer participants.

In order to help determine whether the survey data truly represents the provincial population of brokers by region, it is important to show the percentage of participants against the total number of brokers in each region

to see if there are consistencies in representation and if there are areas that require further investigation.

Looking at the participation by board region we find that the smaller regions have a larger percentage of participation in the survey relative to the number of brokers within the region.

¹ Appendix 4, page A-71

Six of the regions, including Chilliwack and District, Northern BC, Okanagan Mainline, South Okanagan, Vancouver Island, and Victoria, have participation percentages of between 26% and 50%, which is a good sample size. Powell River/Sunshine Coast has a 75% participation rate.²

Kamloops, Fraser Valley and the Kootenays are all under 20% participation which may be of some concern in looking at accurate representation. Of greatest concern is the low percentage of participants from Greater Vancouver which has the largest number of brokers but, by far, the smallest percentage of participants at 9%.

Between boards there is a wide variety of numbers of brokers while the number of interviewees in each board is quite consistent (3-5 per board). Clearly the interview numbers are not representative of the number of brokers per board. For this reason, the trends identified throughout the report are taken from the survey data, and the interview responses are used to delve more deeply into those trends.

Participating Brokers: Key Factors

Research participants were identified by a number of factors³:

Associated with a Brand vs. Independently Branded Brokerage:

Of the 253 participants who responded to this question, 108 (43%) identified themselves as independently branded, and 143 (57%) as being associated with a brand.

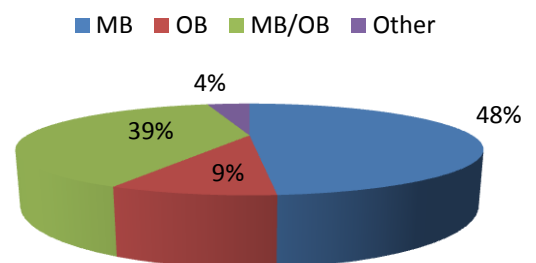
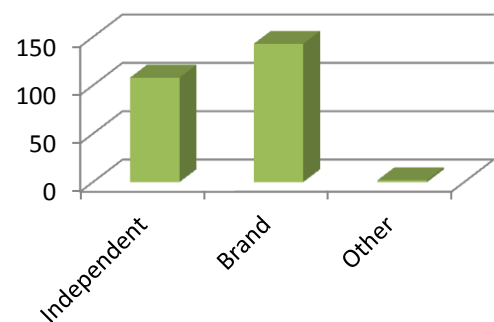
Owner Broker vs. Managing Broker:

Of the 253 participants who responded to this question, almost half (48.6%) indicated that they were managing brokers.

38.7% were both owner brokers and managing brokers, 8.7% were owner brokers, and 4% filled neither role. These participants included general managers, associate brokers responsible for training, and owners who are not brokers.

Board	Survey	Board Broker Numbers	%
CDREB	6	13	46%
FVREB	21	117	18%
REBGV	47	507	9%
KDREB	4	32	13%
KREB	9	49	18%
NBCREB	13	53	25%
OMREB	27	85	32%
PRSCREB	3	4	75%
SOREB	17	38	45%
VIREB	36	76	47%
VREB	20	77	26%
Total	203	1051	

Note: the numbers of brokers submitted by KREB and SOREB are estimates, as no figures were submitted by those boards

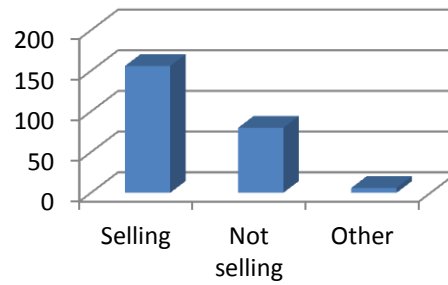


² Data submitted by boards

³ Key factor data on this and following page: Appendix 3-2, page A-52 and Appendix 4, pages A-72/73

Selling/Not Selling:

242 participants responded to this question. The responses show that 156 (64%) are actively selling, 80 (33%) are not selling, and 6 (2%) are rarely engaged in selling (other).

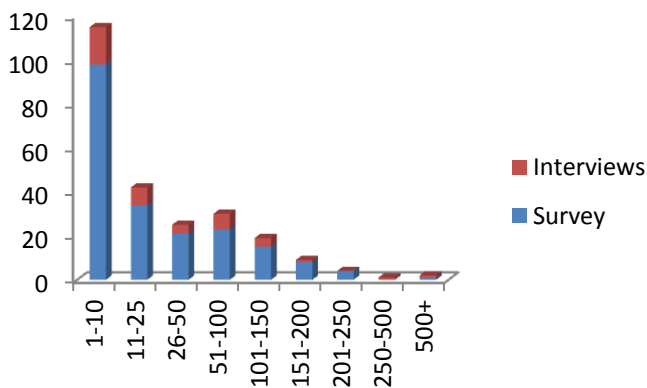


Size of Brokerage:

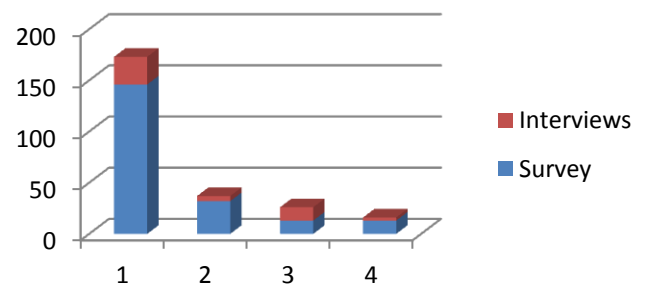
The size of the brokerages, including number of agents and number of offices managed by the brokers, may be key to presenting the data in meaningful ways.

Combining the responses from the survey and the interviews, a large majority of participants indicated that they manage 10 or fewer REALTORS® and manage 1 office:

REALTORS®



Offices Managed



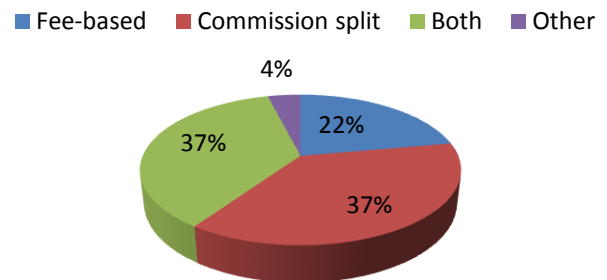
For identifying patterns and trends in the research data this means that small brokerages make up overwhelmingly the large majority of the participants, and that the number of large brokerages (over 200 REALTORS®) is very small. Only one very large brokerage (over 250 REALTORS®) participated in the survey.

Where possible, the report tries to identify concerns of all sizes of brokerages, including the large/very large brokerages. However, since the sample size is so small, further research into the concerns of this group needs to be conducted.

Business Model

Another key difference between brokerages, which may have bearing on the kind and amount of training/education offered in the brokerage, is the business model.⁴ According to the survey, 22% of the responding brokerages are solely fee-based, while 37% operate on a commission split business model. It is also interesting to note that 37%, over 1/3 of respondents, operate with both fee-based and commission split models. The 4% of respondents who indicated “other” identify themselves as either sole employee or co-owners/agents in their brokerages.

Business Models

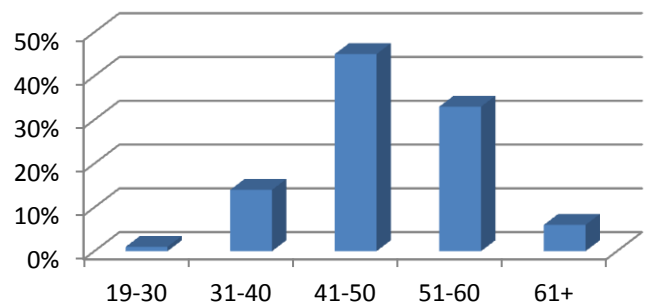


Age Levels

Another statistic in the survey provides information on the average ages of brokers and REALTORS®.⁵

Most of the REALTORS® identified by the participants (78%) were between 41 and 60 years of age (combining the two highest groups). There is a much smaller group between 31 and 40 at 14% while 6% were over 61. Only 1% was between 19 and 30.

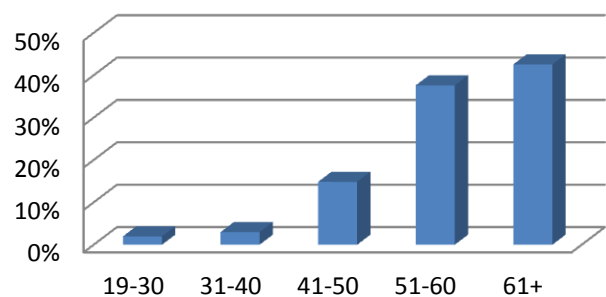
Average Age (REALTORS®)



This differs from the age of brokers. 38% of brokers who responded to the survey were 51 to 60. 43% were 61+.

5% of brokers who participated in the survey were between the ages of 19 to 40 (combining the two groups), and 15% were in their 40s.

Age of Brokers



These age differences bring up issues around succession planning, training of new recruits, and training of new brokers. These issues are identified later in the report

⁴ Appendix 4, page A-73

⁵ Appendix 4, page A-74

Limitations of the Study

There are some limitations in the research:

- The survey participants are self-selected, not randomly selected. This may introduce some bias in the results.
- It is clear that the largest board in the province (Greater Vancouver) is under-represented in the survey results. This may skew the patterns and trends identified in the responses.
- The interviewees are not a random sampling across the province, but are recommended by their boards or colleagues. They are not a percentage of the number of brokers in each board region, but instead, are fairly even in number across all boards (3-5 people per board).
- There may be some overlap between the online survey participants and the interviewees. Since the survey is anonymous, duplicate answers to the same questions cannot be identified.
- The data used to determine trends comes from the survey results, with the results from the interviews used to delve a little deeper into the identified issues.
- Comments from both the interviews and surveys have been combined where appropriate.

Education Models in BC Brokerages

This section focuses on the spectrum of education models in BC brokerages. This includes both formal and informal training, as well as the factors that influence training. It reports on the types of education models but does not provide an assessment of the quality of those models. It also describes what respondents identified as an “ideal vision for an education model for licensees”.

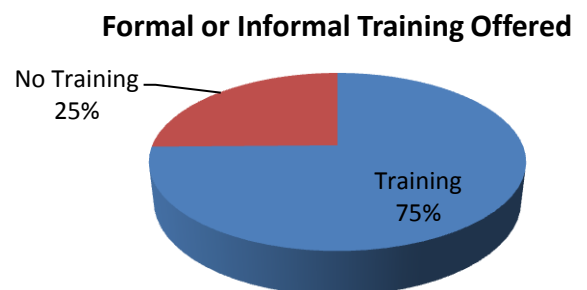
Education Models

The combined survey and interview data indicate that 75% provide some kind of training, either formal or informal. This means that 25% of broker participants offer no training of any kind.

Formal vs. Informal Training:⁶

Formal training includes scheduled courses or training sessions, while informal training can include:

- mentorship
- education components of sales meetings
- information distributed via social media
- newsletters
- online question and answer with experts
- just-in-time dialogue or contract review
- distribution of online articles, etc.

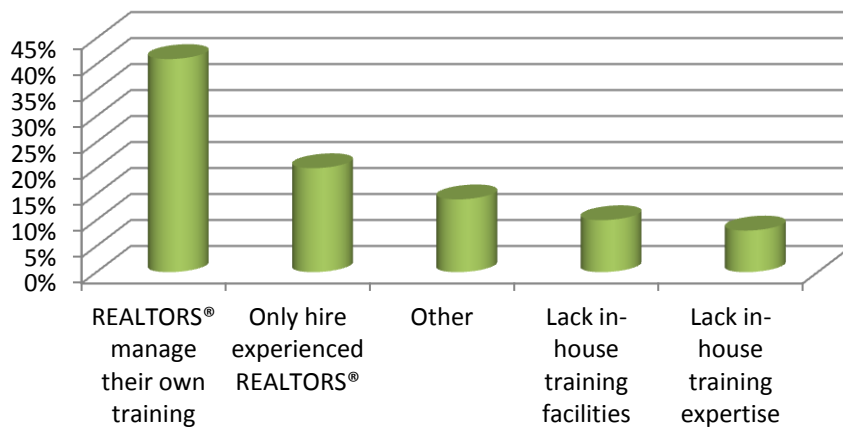


⁶ Appendix 4, page A-75 and Appendix 2, Question 1, pages A-6 to A-11

No Training:⁷

25% of brokerages do not offer training. The following reasons, in order of frequency, are identified:

- REALTORS® manage their own training.
- They only hire experienced REALTORS® .
- Brokerage is one-person, or a cooperative of owners (“Other” in the graph below).
- Brokerage lacks in-house training facilities or expertise.
- Brokerage lacks the financial resources needed for education/training.



Factors that Influence Training

The factors that influence training are identified as brokerage size, location, associated with a brand or independently, availability of resources, hiring practices, and business models.

Size and Location

The size of brokerage may be the most important factor in the research. The table below shows the size of brokerages, as reported by their boards, across the province. The vast majority of brokerages are small: 65% are 1-10, and the percentage diminishes as the brokerage size gets larger. Only 2 brokerages (0.2%) are over 250 REALTORS® .

Brokerage Size	Total Number	Percent
1-10	623	65%
11-25	155	16%
26-50	78	8%
51-100	66	7%
101-150	26	3%
151-200	8	1%
201-250	4	0.5%
251->500	2	0.2%

Note that we are unable to get this breakdown for the Kootenays or South Okanagan, so the percentages are based on the total number of brokerages per board as per this breakdown: 962

Data from these boards are missing in the table below as well.

⁷ Appendix 4, page A-75 and Appendix 2, Question 1, pages A-6 to A-11

A comparison (shown below) of the number of survey participants per board (**red**) with the total number of brokerages per board (**black**), by size of brokerage suggests:

- Significantly more participating brokers were from small brokerages of 1-10, than any other size of brokerage. This is also the case in the provincial numbers above.
- Comparing size of brokerage by board, all boards have survey participants from small brokerages. Participants from larger brokerages (over 100) come from Greater Vancouver, Okanagan Mainline, and one from the Kootenays. Only Greater Vancouver has a participating broker with a very large brokerage of over 500.

Survey Participants/Total Number of Brokerages by Size per Region:

Board	1-10	11-25	26-50	51-100	101-150	151-200	201-250	251-300	301-400	401-500	>500
CDREB	3/8	1/1	1/2	1/2							
FVREB	2/30	6/12	2/11	5/20	6/4						
REBGV	19/375	2/45	4/35	12/38	3/20	3/8	3/4	0/1			1/1
KADREB	4/25	0/2	0/1	0/2							
KREB	7	1					1				
NBCREB	9/53	2/7	2/3								
OMREB	17/71	1/9	4/6	1/2	2/2	2/0					
PRSCREB	2/3	1/1									
SOREB	11	4	1	1							
VIREB	13/60	14/20	6/9	3/2							
VREB	11/8	1/58	1/11		4/0	3/0					

Note: some discrepancy may have occurred in that boards were asked to submit only residential data, while some commercial brokers may have completed the survey. Also, the number of REALTORS® in the brokerage may have fluctuated since the last report to the board.

Urban vs. Rural⁸

Over half of survey participants (56%) stated that their brokerage operates in both urban and rural settings, 31% work in both urban and rural areas, while only 11% work in totally rural areas.

No Training⁹

Brokerage size and location also have an impact on those that do not offer training. As shown earlier in the report, 75% of survey respondents provide training, while 25% do not. From the survey data, 86% of those who reported that they do no training were from brokerages of 1-10 REALTORS®.

Generally, smaller brokerages are overly represented in those not doing training for many reasons, including those reasons previously listed:

- REALTORS® manage their own training.
- The brokerage only hires experienced REALTORS®.
- The brokerage is one-person, or a cooperative of owners.

⁸ Appendix 4, page A-71

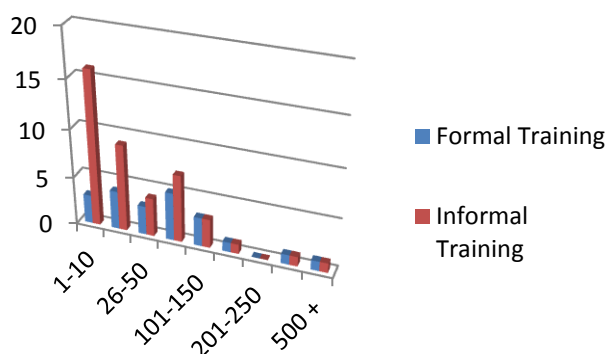
⁹ Appendix 4, page A-75 and Appendix 2, Question 1, page A-11

- The brokerage lacks in-house training facilities or expertise.
- The brokerage lacks the financial resources needed for education/training.

Formal vs. Informal Training

While the survey did not differentiate between formal and informal training, the interview questions did. The interviewees further identified the kind of training that they offered.¹⁰

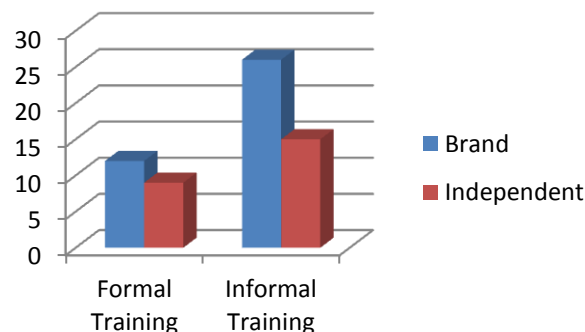
Looking at the survey data by size of office, it is clear to see from the graph that small offices, of 1-10, engage far more in informal training than formal training.



As the offices get larger, the ratio of informal to formal training becomes more even.

Associated with a Brand/Independently Branded

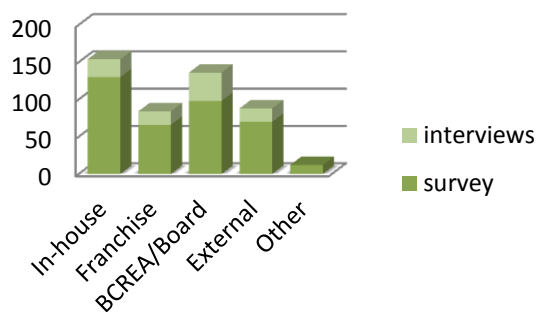
From the interviews, brokers indicated that both those associated with a brand and those who are independently branded provided more informal than formal training. Brokerages associated with a brand provided more of both kinds of training than independently branded brokerages.¹¹



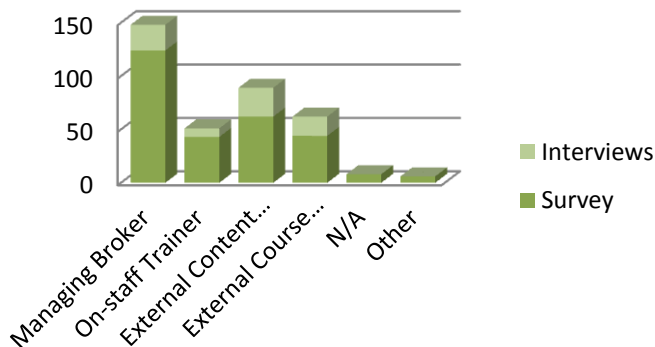
Education Source

Surveyed brokers indicated that they obtain formal training in-house, from their board or BCREA, from their franchise, or from external sources. For informal training, they rely on the managing broker or an external source. 51 respondents indicated that they had an on-staff trainer who wasn't the managing broker.¹²

Formal Education Sources



Informal Trainer



¹⁰ Appendix 2, Question 2, pages A-6 to A-10

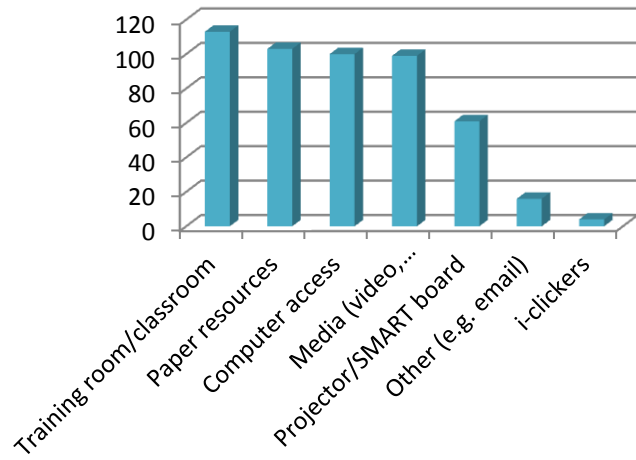
¹¹ Appendix 2, Question 2, pages A-6 to A-10

¹² Appendix 4, page A-75

Resource Availability

Survey respondents indicated that they used a variety of training resources in their brokerages, including (in order of frequency):¹³

- training facilities
- paper resources
- computer access
- media
- projector/Smart Board
- other
- i-clickers



Engagement and Assessment

Through the interviews, brokers indicated that they actively try to engage REALTORS[®] in training by:¹⁴

- holding regular meetings to discuss and encourage participation.
- trying to make training meaningful, interesting, and relevant.
- building a good culture, providing support, giving advice, and having an open door/cell phone/text policy.
- encouraging dialogue, question and answer, or feedback loops.
- providing one-on-one coaching.
- organizing emails/webinars/speakers to meet needs.
- providing templates, sending out reminders, minutes, emails, or memos of training/meetings.
- offering good service.
- being “up-front”.
- getting feedback from REALTORS[®].
- reinforcing BCREA seminars and encouraging REALTORS[®] to get their PDP credits ahead of time.
- making training mandatory.
- requiring accurate documentation before agents get paid.

Assessment

Brokers report that they assess REALTOR’S[®] learning through a number of mechanisms.¹⁵

¹³ Appendix 4, pages A-75/76

¹⁴ Appendix 2, Question 2, pages A-12 to A-15

¹⁵ Appendix 4, pages A-78/79 and Appendix 2, Question 2, pages A-12 to A-14

Observation

The majority of brokers assess learning primarily by reviewing contracts and other required documentation. Brokers report that they, or their designate, review all contracts. Some look specifically at:

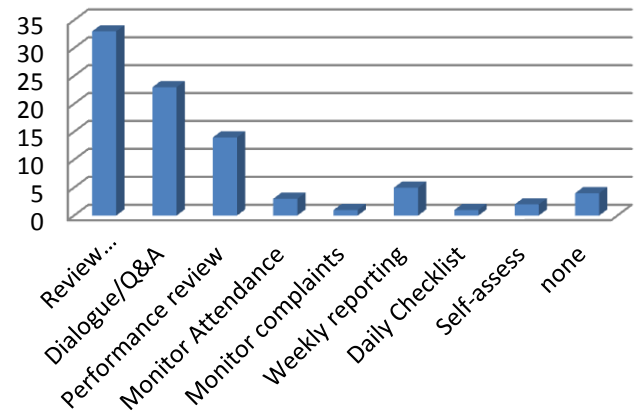
- contracts of REALTORS® who have had challenges in the past.
- contracts of REALTORS® who have language issues.
- common errors/trouble spots.
- odd or different property types.
- completion of all required documentation, i.e. FINTRAC.
- completion of templates and effective use of standard clauses.

Performance

Brokers report using performance measures to assess REALTORS®:

- number of sales
- number of listings
- income
- complaints

Assessing Experienced Agents



Attendance

Many brokers also assess their REALTORS® by monitoring attendance. This includes:

- attendance at sales meetings.
- desk/office time; how much time REALTORS® are putting in.
- timely completion of required PDP credits.
- notification from in-house training system regarding courses that have been completed.
- monitoring the overall efforts of their REALTORS®.

Interactions with REALTORS®

Many brokers assess their REALTORS® through their daily interactions with them, including through:

- questions they ask.
- questions they don't ask.
- dialogue/conversations with broker, trainer, other REALTORS®.
- email and text exchanges.
- interactions with clients.

Although performance reviews are the most common assessment strategy, there are often more formal "homework" assignments for new recruits, and day-to-day observation is important.

Ideal Vision of an Education Model for Licensees¹⁶

Concern has been raised about the education strategy currently used to train licensees, so part of this research was designed to elicit from participants their “ideal vision” of an education model for licensees from pre-entry to retirement. Common themes emerged.

Pre-entry

It was felt that, prior to entry into the industry, applicants should have to meet higher entry standards. A screening process should include both aptitude and skill testing. It should also include an orientation to the industry, which would provide an overview of the reality of the business in terms of costs, workload, and time commitment.

Real Estate Trading Services Licensing Course

The pre-licensing phase currently consists of the *Real Estate Trading Services Licensing Course*. However, two ideas were suggested for this education phase:

- Create a professional diploma program of greater depth and breadth than the current course. This would consist of a number of relevant courses with formal assessment and a 6-month articling/apprenticeship period in a brokerage prior to licensing.
- Revise the current pre-licensing course to bring it up-to-date. This would include:
 - removing mortgage calculations and other tasks now completed by mortgage brokers.
 - focusing on the solid fundamentals of contracts, legal, and liability.
 - including communication skills, people skills, ethics, and small business skills.
 - the effective use of current technologies.
 - increasing accountability.
 - adding more rigorous assessments.

Residential Trading Services Applied Practice Course (RTSAP)

It was also suggested that RTSAP be included in pre-licensing education. Field tours should be added and it should be made more practical. RTSAP should be longer, more in-depth, and at a higher level, especially on the legal aspects of contracts, agency, disclosure, and ethics. Again, increased accountability and more rigorous assessments were recommended.

Post-licensing

Post-licensing suggestions included specific course topics, ideas for improving PDP, and ideas for providing resources for brokers to use in their brokerages.

Course topic suggestions included:

- ethics.
- human interactions.
- technology.
- inter-personal communication skills.

¹⁶ Appendix 2, Question 4, pages A-18 to A-21

- succession planning.
- business skills and business planning.

Suggestions for improving PDP included:

- providing more information on what is available.
- providing education material prior to sessions.
- focusing on increasing the quality of the courses.
- making PDP more motivational/relevant/interactive.
- broadening the ethnicity of trainers, especially in the Lower Mainland.
- including assessment strategies for PDP courses.
- increasing internet options for remote locations.

Suggestions for developing or providing resources for brokerages included:

- providing education bulletins online for sales meetings (not scripted).
- providing information on where licensees can go for assistance.

PDP/Brokerage Education Alignment¹⁷

According to survey responses, there is room for alignment between PDP and brokerages in the delivery of education and training of licensees.

Key findings from the survey regarding PDP/brokerage education and training are:

- 98% of brokers surveyed agree/strongly agree that education plays an important role in elevating the status of the real estate profession.
- 95% agree/strongly agree that organized real estate has a role to play in providing education.
- 55% agree/strongly agree that education is important for recruitment while 15% do not, and 30% have no opinion.

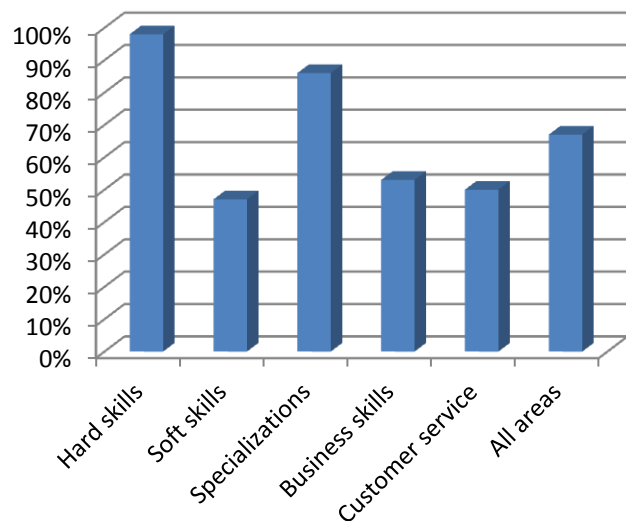
Education Areas

The following data is from the survey as a whole. More detailed data parsed by some of the key factors that influence training, such as size and region, are provided as well.

Hard Skills and Specialized Properties

Survey responses indicate that brokers overwhelmingly agree that PDP should focus on hard skills (98%) and specialized properties (e.g., strata, green building) (87%).

Survey Responses



¹⁷ Appendix 4, pages A-81 to A-83

According to the survey responses as a whole, these topic areas are clearly within the realm of PDP training.

Secondary Skills

Survey participants identify some issues regarding the other topic areas of “soft” (sales) skills, business skills, and customer service skills; and who should be responsible for providing that training.

Around half surveyed indicate that PDP should also focus on soft skills (47%), business skills (53%), and customer service skills (50%); and 67% agree that PDP should cover all competency areas.

However, the data shows that between 10% and 33% of participants have no opinion about who should provide secondary skills training. This may be affected by the fact that 25% of participants indicated that they do not offer training. Some of those may have no opinion about who does offer the training.

Interview responses correspond to the findings from the survey, and also indicate which organization should be providing the training.¹⁸

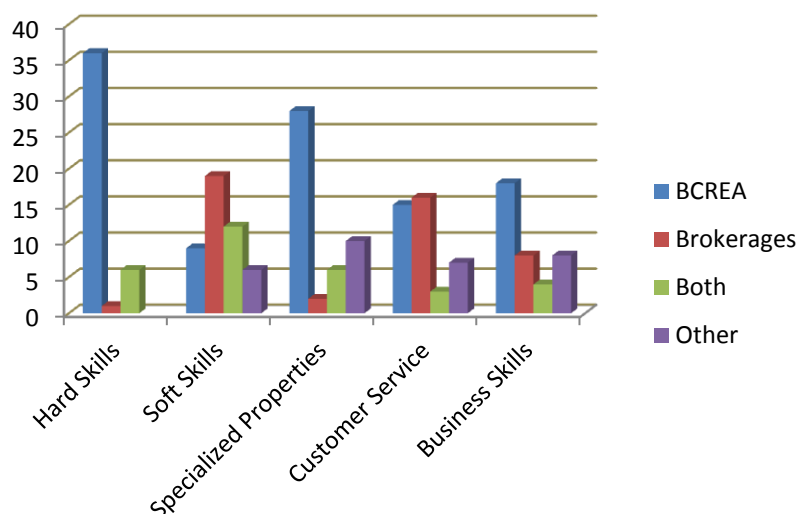
Looking at the aggregate data, it seems clear that BCREA is seen to be largely responsible for training in the hard skills, and has a significant role to play in training around specialized properties. It may have some role in providing training, information, or resources in the other topic areas.

It should be noted that, in the secondary skill areas, the perspectives were very polarized. That is, those who indicated that BCREA should not be encroaching on broker territory in teaching these skills were quite adamant about it.

Where interviewees indicated that there were possibilities for alignment in these areas, they generally discussed the role of BCREA as provider of baseline training that brokers could follow up on. They also saw a role for BCREA in providing ongoing information for the broker to use in training/meetings at the brokerage level, or identifying external training that boards or brokerages could access.

Along with BCREA and brokerages, “other” training providers have been identified. These include external vendors, boards, Council, and CREA. In the case of specialized properties, a designation program through Sauder has been suggested as appropriate.

Interview Responses

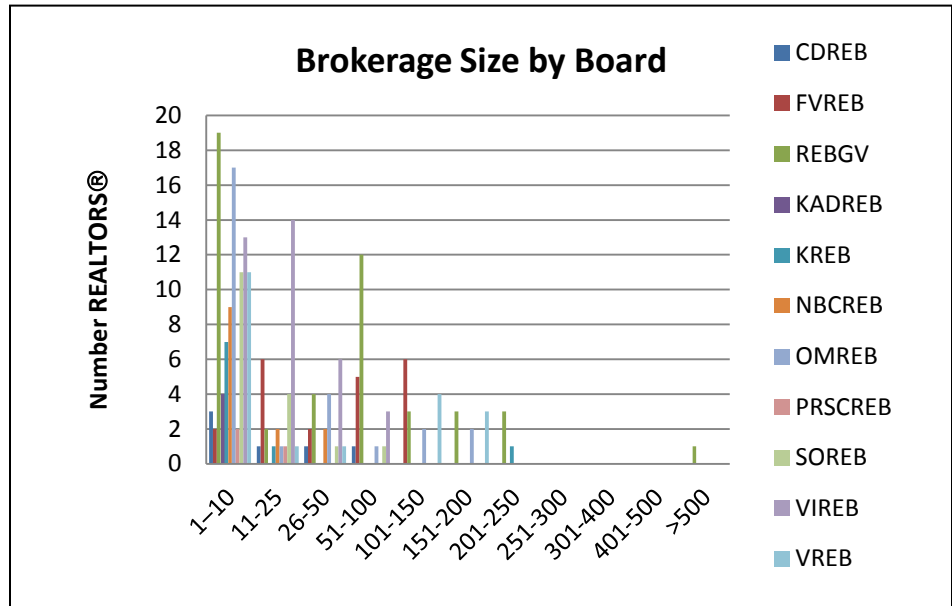


¹⁸ Appendix 2, Question 5, pages A-22 to A-29

Key Factors¹⁹

As discussed previously in the report, trends in the data can be looked at from the perspective of a number of filters: size, role of broker, selling/not selling, and independently branded vs. associated with a brand. Size and location of brokerage are key factors, both in terms of education models and preferences for which organization (i.e., BCREA, brokerage, brand, board, external vendor) provides the training in the different competency areas.

The sizes of brokerages by board, as identified by survey participants (see



graph above), reveal some common features of the various sizes of brokerages. Patterns and trends emerge in how participants answered the questions about training in different areas of competency.

Scenario 1: Small brokerage (1-10 REALTORS[®]): managing brokers or owner brokers, actively selling, and independently branded

- For this group, there is greater preference for BCREA to offer all training, including secondary skills, and less interest in using training for recruitment.
- Brokers in this scenario are busy with multiple roles and have less access to brand training. Therefore, they may have a preference for training to be provided by organized real estate.
- This group also includes single-person brokerages that do not hire or offer training.

Scenario 2: Medium brokerage (11-50 REALTORS[®]): managing broker, actively selling, associated with a brand

- For the medium-sized brokerage, there is less interest in BCREA providing all the training.
- Brokers in this scenario may have more access to brand training and/or may have more resources available to assist with the training, e.g. larger office, training facilities and resources.

Scenario 3: Large brokerage (51-500+ REALTORS[®]): managing broker, not selling, associated with a brand

- The large brokerages in the research indicate that they do not want BCREA training in the secondary skills, and they are interested in using training as a recruitment tool.
- The large brokerages may have more access to brand resources, the ability to hire an in-house trainer, and more financial resources to put towards education.

¹⁹ Appendix 2, Question 3, pages A-16/17

Note: As there was only one brokerage of over 500 REALTORS® who participated in the survey, we cannot identify patterns or trends from this demographic. More research is needed. Since small brokerages make up the largest single group of research participants, there may be a tendency for the data to reflect the opinions of the small brokerages.

In conclusion, the survey and interview data support the following trends:

- Small brokerages tend to offer more informal training. The trainer is usually the broker, and there is a tendency to want organized real estate to offer training in all areas.
- Larger brokerages tend to offer both formal and informal training. Many have dedicated in-house trainers, and there is a tendency to use training as a recruitment tool. The larger brokerages do not want organized real estate to be responsible for training in the secondary skills.
- Geography/location is also important. All boards have small brokerages, but many boards do not have large brokerages. As well, larger urban centres have greater access to training, either by the brokerage or the board, and lower travel costs. Small rural centres have less access to training and higher travel costs to get to what training there is.
- Many interviewees referenced business models as having an impact on their ability to deliver training. This is especially true for those which operate on the “desk fee” model, or are moving from the commission split to the desk fee model. The two issues identified were lack of funds to bring in external trainers and the difficulty in making training mandatory for “contractor” licensees.

Comments

The comments which come from both the survey and the interviews²⁰ illustrate the issues. These comments are provided by the participating brokers themselves:

Hard Skills

Brokers made the following comments about training in hard skills:

- “Due to ongoing changes and legal requirements, it is important that BCREA takes on this training, with broker following up.”
- “Must be ongoing, standardized, and consistent across the province.”
- “Resources for brokers to use with staff on a weekly basis would be appreciated.”
- “Course costs are reasonable – a good deal.”

Soft Skills:

In support of BCREA providing training in this area, participating brokers made the following comments:

- “Good for online courses.”
- “Would be good to have a course with the basic skills, make it consistent standard across the province.”
- “Good for small brokerages to have soft skills taught by BCREA.”
- “Should not be mandatory – an elective.”
- “Should be cost recovery.”
- “The more training the better.”

²⁰ Appendix 2, Question 3, pages A-16/17

Brokers who do not support BCREA providing soft skills training stated:

- “BCREA should not be teaching soft skills, but how to take an ethical/legal approach to doing them.”
- “If you do formal courses in soft skills, you are getting into brokerage territory. It is seen as a competitive advantage by franchises and larger brokerages.”
- “There is tons of stuff from third parties, not sure BCREA needs to put the time into this.”

Specialized Properties

Regarding training in specialized properties, brokers commented:

- “Strata at a minimum should be mandatory.”
- “Some consider the local nature of the issues – maybe should be at the board level.”
- “Optional/online materials would be good.”
- “Strong opinions that there should be designations for different specialized properties.”
- “BCREA deal with provincial issues, brokerages with local issues.”

Customer Service:

Customer service is a very controversial topic. It is not clear that all interviewees thoroughly understood what is meant by “customer service”. It would be worth following up with more research and a clear outline of what this topic means.

Brokers in favour of BCREA providing training in customer service stated:

- “BCREA could offer overview “at 3000 feet” – a base of service level.”
- “Could be part of pre-licensing.”
- “A lot of effort for low impact.”

Brokers in favour of brokerages providing customer service training stated:

- “Brokerage offers more advanced level.”
- “Part of branding – not BCREA.”
- “Should be taught as part of a mentorship.”
- “Some brokerages would push back – would vehemently oppose BCREA coming into our brokerage and telling us how to do this.”

Small Business Skills

Brokers in favour of BCREA providing small business skills training stated:

- “LOVE IT”
- “Great idea!”
- “Optional – not mandatory”
- “Pre-licensing phase”
- “This should be a requirement before they come into the industry.”
- “Should be part of 2 year diploma program for licensing.”
- “BCREA absolutely. Definitely they need to be trained.”

- “Doesn’t have to be a course; could be information on a website.”

Brokers in favour of small business skills training being provided within brokerages commented as follows:

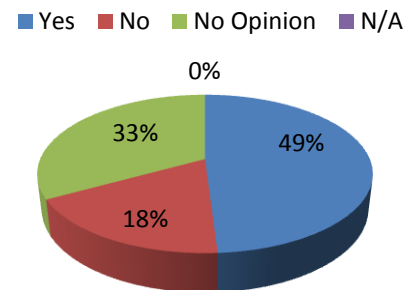
- “Stepping on brokerage’s game plan.”
- “We should not waste BCREA money benefitting the broker who just rents an office.”
- “Would be a big, horrendous undertaking for BCREA.”
- “Have to think about anti-competition.”
- “Independent contractors – responsible for this on their own.”
- “Also need this at the broker level.”

Accrediting Brokerage Training

According to the online survey, regarding accrediting some in-house training:²¹

- 49% strongly agree/agree
- 33% have no opinion
- 18% disagree/strongly disagree

Survey: Accrediting In-House Training



Among those interviewed:²²

- 50% indicated that accrediting in-house training would be beneficial
- 25% disagreed
- 14% were not sure
- 11% had no in-house training to accredit

Looking at the responses by size and associated with a brand vs. independently branded, we find that respondents from small and large brokerages associated with a brand more strongly agree that there should be a mechanism for brokerages to have some of their in-house training accredited than independently branded, small and large brokerages. However, those agreements were tempered with concerns about implementation, management, enforcement of standards, and practicality. The section below describes these issues.

Issues

While approximately half of those surveyed and those interviewed approve of accrediting in-house training, a number of issues were identified:²³

- Managing the approval/accreditation process would be very difficult and assuring compliance and monitoring would be too onerous.
- It would not be a recruitment advantage.
- Quality and consistency of in-house courses would be a concern.
- Qualification of instructors: how they would be trained, monitored, evaluated, etc.

²¹ Appendix 4, pages A-82/83

²² Appendix 2, Question 6, pages A-30 to A-33

²³ Appendix 2, Question 6, pages A-30 to A-33

- PDP would become weaker.
- Could be misused by the broker.
- Training is the “meat and potatoes of brokerage – BCREA should stay out of this.”
- BCREA/board must be careful not to favour business style, size of business, model.
- “Not good” for small offices who do not have formal courses.

PDP Recommendations

Interviewees commented on both the funding model for PDP, and general observations about “what’s working” and “what needs to be improved” in PDP and in the funding model.

Funding Model²⁴

Only the interviewed brokers commented on the existing funding model. Of the 30 who responded to the question, 20 found the funding model acceptable, 7 said it was not acceptable, and 3 were unsure. Most brokerages do not contribute to the costs of PDP for their REALTORS[®].

Note that the comments below are directly from broker participants, based on their own perceptions of how the funding model works. For example, the use of the word “subsidy” may not accurately describe the existing funding model.

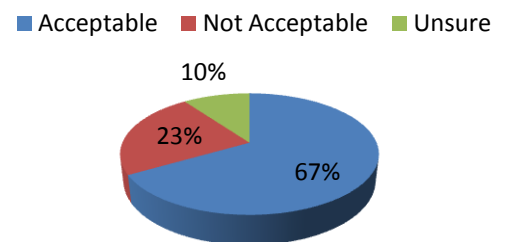
Positive comments about the funding model include:

- “Prices are very reasonable and half what they would be externally.”
- “Some subsidy is a good idea.”
- “I like subsidy model; it keeps costs down.”
- “Subsidies for mandatory courses keep costs reasonable.”
- “It’s a bargain in education.”
- “I like 3-credit courses; it’s a hit and run.”
- “Education is a good use of fees.”
- “Good business decision to keep costs as low as possible.”
- “Am looking forward to new courses.”
- “Courses really cheap compared to other professions.”

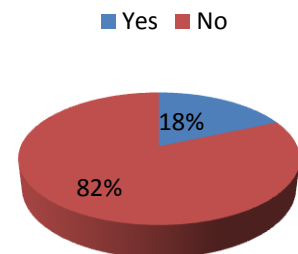
Broker suggestions for improving the funding model include:

- a need for higher grants, and more grant subsidies for remote regions to put on courses.
- the feeling that PDP should be on a cost-recovery basis.
- the feeling that the courses should cost more while others feel the courses should cost less.

Funding Model



Brokerage Contributes to Costs



²⁴ Appendix 2, Question 7, pages A-34 to A-37

- the need to review board fees if more training were to be coming from brokerages.
- some feeling that the true cost of courses should be paid by REALTORS®.
- some desire to see a “cost per REALTOR® ” funding model.

PDP Recommendations²⁵

Comments from the survey and interviews describe what’s working and what needs improvement in PDP, both generally and more specifically for brokers.

What’s working in PDP?

A number of brokers:

- feel there are some good instructors, especially in *Legal Update* and *Agency*.
- appreciate that some courses are regularly updated.
- like the direction of learning paths, especially for brokers.
- want increased online options, especially in rural areas.
- feel that PDP is “pretty good” for REALTORS®

What needs improvement in PDP?

Broker comments regarding improvements in PDP include the following:

- “Quality should be improved.”
- “More motivational, less dry instructors.”
- “More online courses.”
- “Don’t develop unnecessary courses, use better instructors, add webinar courses, minimize costs”
- “BCREA needs to take complete responsibility and just rent space from boards – make courses more uniform.”
- “Remove layers of industry regulators/regulations to make more money available for training.”
- “BCREA coming up with new courses to justify their education division: avoid empire building.”
- “Some courses should be available to all licensees, whether or not they are in a board.”
- “Keep abreast of technology.”
- “Consider having hard skills/mandatory courses subsidized, soft skills courses cost recovery.”

What needs improvement in broker education?

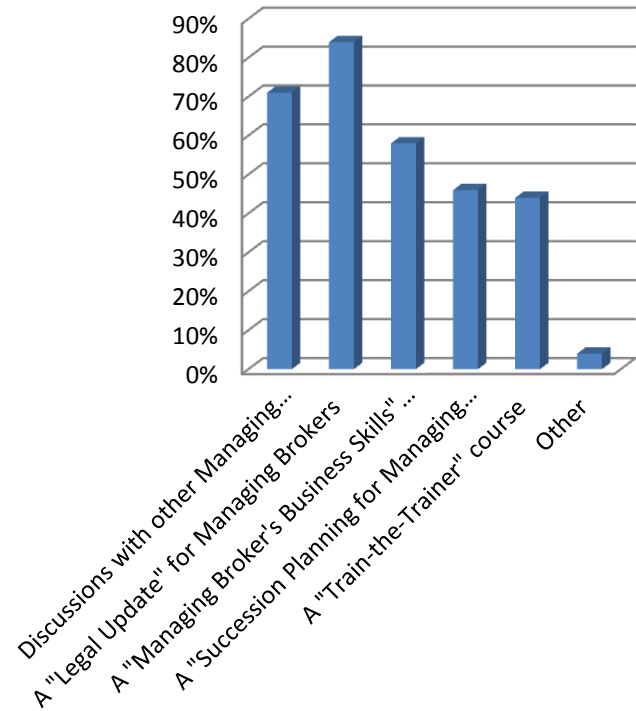
Broker comments include:

- “There needs to be some choice. Is currently too repetitive.”
- “Content is targeted too low/not relevant for the broker.”
- “Quality of PDP instructors is uneven.”
- “Want more interactive/motivating professional development.”
- “Different credit options for brokers: facilitated discussion groups, panels, webinars, industry/community involvement (Category C).”

²⁵ Appendix 2, Question 8, pages A-38 to A-42

According to the survey, brokers identified their interest in the following education opportunities:

- Discussions with other brokers, facilitated by a professional, e.g. a lawyer, on issues related to:
 - contracts
 - agency
 - disclosure
 - managing a brokerage
 - managing conflict
 - using technology
- Specific courses geared to the needs of brokers include:
 - *Legal Update for Brokers*
 - *Business Skills for Brokers*
 - *Succession Planning for Brokers*
 - *Train the Trainer*
- In addition, the interview responses identified additional topics/courses geared to brokers:
 - human resource management (including conflict resolution)
 - risk management
 - how to run a brokerage
 - processes
 - systems
 - legal/technical requirements, i.e. FINTRAC.
 - financial management (including handling trust accounts)
 - how to train others
 - rural/regional special topics, i.e. mobile homes/electrical codes, wells, septic



Beyond PDP for Brokers

Along with additional courses for brokers, the surveyed and interviewed brokers identified the following resources that BCREA could provide to help them with their in-house training:

- education resources for brokers to use at sales/staff meetings, e.g., 10 minute education topics, could include short videos, e-bulletins, case studies

They also suggested that it would be useful to have:

- increased opportunities for networking with other brokers.
- increased REBA presence.
- education tied to designations, i.e. specialized properties.
- diploma program through Sauder specifically for brokers.

Recommendations for Moving Forward

Recommendations coming from the research focus on the following areas:

PDP focus and improvements

BCREA should continue to:

- Focus on hard skills training and specialized properties but work with boards to address local issues.
- Transform PDP courses generally to be more practical, to be more interactive, and to include accountability and assessment.
- Develop learner pathways, particularly in the managing broker stream, to ensure variety and relevance.
- Develop more online courses/seminars, particularly for rural communities where access and cost are barriers to participation.

BCREA should consider:

- accrediting training in the secondary skills areas under Category C of the new PDP credit system. A number of brokers, particularly in smaller brokerages, have indicated a need for training in these areas. Brokers have also expressed that BCREA not create new courses in this area, but rather make available choices from the numerous options that already exist, e.g. procure/curate. These courses should be optional, not mandatory, and possibly offered on a full cost-recovery basis.
- conducting environmental scans of existing education resources before embarking on new course development. This would ensure BCREA does not duplicate existing training, e.g., specialized properties, business skills, soft skills. Brokers expressed concern that fees be used efficiently and effectively.
- making education resources available on a not-for-credit basis, including informational websites on topics related to running a small business.
- creating education resources that can be used by brokers in their education activities.

For managing broker education needs, BCREA should consider:

- developing courses that meet brokers' specific needs. Options include tweaking existing hard skill courses, such as *Legal Update*, for the broker audience, or running such courses as previews with a broker audience. Also consider developing/accrediting courses that focus on broker-specific topics, such as business operations, systems, financial management, human resources, conflict resolution, ethics, managing the "independent contractor," etc.
- providing opportunities for brokers to discuss common issues (seminar, conference, etc.). This may be a joint activity with REBA.
- broadening what counts toward PDP credits for managing brokers under Category C. This may be a joint activity with REBA.
- working with REBA and an education institution, such as Sauder School of Business, to develop a more comprehensive training program for new brokers. There is concern that new brokers do not know what to do in the day-to-day operation of their brokerage and there is little training available to support them.

Further research needed:

Certain components of this research turned up issues of concern that need further research.

Issue: Larger brokerages were under-represented in the research.

Additional research is needed to identify the preferences of the large urban brokerages in determining the role of BCREA as trainer in secondary competency areas. Because large urban brokerages represent a small number of brokerages province-wide, this should best be done with focus groups rather than surveys.

Issue: Lack of Knowledge about PDP.

Many interview participants had difficulty answering the interview questions on:

- the acceptability of the current PDP funding model.
- training related to minimal levels of customer service associated with the REALTOR® brand.
- accreditation of in-house brokerage courses for PDP credit.

In order to clarify preferences/trends in these areas, BCREA should develop concrete proposals in these topic areas for brokers to respond to in focus groups that represent broker size, region, and branding.

Issue: REBA was unfamiliar to many managing brokers outside of the lower mainland.

REBA should develop an outreach strategy for brokers across the province. There's an interest in REBA but very little knowledge about it or familiarity with it.

Issue: Planning for Succession

38% of brokers who responded to the survey are between the ages of 51-60, and 43% are over the age of 61. With significant numbers of managing brokers entering their retirement years, succession planning is a significant issue. Questions for consideration:

- What are the challenges in recruiting and retaining new managing brokers?
- What activities are brokerages currently undertaking for succession planning?
- What training is available or needs to be available to ensure new managing brokers have knowledge and skills to succeed?
- What strategies can be implemented to recruit and support new managing brokers?

REBA could run focus groups with managing brokers that represent different broker sizes, regions, and branding to better understand the issues and begin to develop succession strategies.

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Introduction to the Appendices

These appendices are included to provide the reader with the survey and interview data that were used to generate the report. They are provided for information purposes only and represent the participating brokers' own perceptions. They are not meant to describe actual processes or facts about the industry.

Appendix 1: Broader Issues includes themes that came up a number of times in the survey responses or interviews. Since direct questions about these issues were not specifically asked, there is no quantitative data relating to these issues; thus, there is not enough data to analyze in terms of trends. They are included for information purposes only.

Appendix 2: Summary of Question Responses includes the responses by the interviewed brokers to the ten questions asked in the face-to-face and telephone interviews. Again, the comments provided by the interviewees are their own perceptions. They may or may not represent the reality of the industry.

Appendix 3: Filter Reports provides the raw survey data filtered by Question, Trends, Competency Area, Brand/Business Model, Roles, Number of REALTORS[®] in Brokerage, Board Region, Service Area, and Formal/Informal Training.

Appendix 4: Summary Reports of Online Survey includes four reports generated directly from the online survey. They include a summary report of all the data, and those sorted by managing broker, broker owner, and both managing/owner broker. There were not enough responses from owners who were not also brokers to identify trends.

Appendix 1: Broader Issues

Through the interview process, broader issues in the real estate industry emerged that are related to education. Although the interview questions did not address the following topics directly, a number of brokers addressed them as systemic issues underlying the interview questions.

An industry in transition

An issue identified from the interviews was that the real estate industry is undergoing a transition in business modelling. There is a movement away from the split commission model to the desk fee model. This shift has had a two-fold impact on education:

- Many REALTORS® are no longer employees but independent contractors, making education more difficult to mandate or enforce.
- Many brokers feel that, to remain competitive with lower desk fees, they no longer have funds available for education of their REALTORS®. The result is that there is an education gap emerging in the industry.

Brokers are polarized in how to respond to these changes.

Organized Real Estate Should Fill the Gap

Some brokers suggest that organized real estate should fill the gap across all competency areas. Their rationale is that the industry as a whole should have access to consistent, quality training. This would result in more REALTOR® retention in the industry, reducing the high turnover that currently exists. This would also increase quality in the industry, raise the level of professionalism overall, and offer greater protection to the public.

Industry Should Maintain Secondary Training

Some brokers suggest that organized real estate does not have a role in education beyond hard skill competencies. Organized real estate should stay out of secondary skills training and let the industry sort out its own business models. Brokerage specific training is what gives brokerages their competitive advantage and the industry does not need or want to be homogenized.

Is there a marriage of the two?

Some brokerages are finding success maintaining a competitive fee structure to attract REALTORS® while providing education and training.

REALTOR® Professionalism

What does it mean to be a REALTOR®? Are REALTORS® licensees, trades people or professionals? How are those terms defined? Many REALTORS® want professional status but fear the public does not perceive them as such. When brokers compared real estate to other professions, such as law or accounting, they identified notable differences. Compared to other professions, real estate is perceived to have:

- low barriers to entry.
- minimal post-secondary education requirements.
- a lack of an internship/apprenticeship program.
- a lack of formal assessment in the licensing process.

- a lack of accountability in the profession, i.e. low ethical standards.

What changes need to be made in the industry if REALTORS[®] want to achieve professional status? Brokers suggested that:

- if barriers to entry were higher, there would be fewer overall problems in the industry.
- there needs to be a diploma or degree in real estate prior to licensing.
- there needs to be stricter enforcement of Council Rules and the REALTOR[®] Code of Ethics.
- there should be higher standards associated with being a REALTOR[®] than a licensee, and that a REALTOR'S[®] value proposition should be clearly defined, understood, and upheld.

Content

Content varies and includes one or more of the following:

- orientation to industry: “Career Night”.
- orientation to office/brand, systems, expectations, working with managing brokers.
- orientation to technology and MLS.
- hard skills: contract writing, review/complement/drill down of the Applied Practice Course.
- properties: comparative market assessment, valuations, measuring homes, property features, specialized properties .
- business planning: business plans, marketing, social media.
- sales: lead generation, prospecting, gentle sales, closing, buyer’s presentation.
- technology/office skills: letters, email, corporate technology
- interpersonal skills: attire, psychology

Variety of Teaching Methodologies

- lecture
- video
- role play
- sharing
- question and answer
- group work
- case study/scenario-based learning
- field trips, e.g., city hall, measuring a home

Assessment Types

- homework
- demonstration
- weekly performance review

Third Party Training Programs

- Brian Buffini
- David Knox
- Floyd Wickman
- Mike Ferry
- Richard Robbins
- Ninja Selling

Resources

- brand: university courses, webinars, materials, booklets
- in-house developed modules, booklet, templates

Approaches to Informal Education/Training: New REALTORS®

Mentorship (Apprenticeship)Models

- split commission, co-listing, and flat-fee models
- new REALTORS® paired with experienced REALTORS®, with permission from the client
- managing broker providing mentorship

- external trainer/consultant providing mentorship
- formal training supplemented with a three-month mentorship program: how-tos, gentle sales, building rapport
- office manager/administration: licensing, practicing REALTOR®

Mentorship Duration

- 80 hours
- 90 days
- six months
- as needed, ongoing

Mentorship Methodologies:

- observation (mentee observes mentor; mentor observes mentee and provides feedback)
- discussion; Socratic method
- working together with question and answer
- graduated release (mentee helps with mentor's properties/mentor helps with mentee's properties)
- monthly goal setting/check-ins
- working through a manual/program together
- reviewing case studies/mock sales

Coaching

Less formal than mentorship but provides new REALTORS® with ongoing advice and support.

- more limited time with trainer/managing broker
- focused time for questions and answers
- managing broker/trainer available for questions/advice
- providing/suggesting resources, videos

Approaches to Formal Education/Training: Experienced REALTORS®

There are fewer formal education/training programs available for experienced REALTORS® than for new. Formal education for experienced REALTORS® can take many forms:

- A number of brokerages invite experienced REALTORS® to join some or all of the new REALTOR® training programs.
- Some brokerages invite/require struggling REALTORS® to join some or all of the new REALTOR® training programs.
- A few brokerages have formal training programs for experienced REALTORS® or adapt new REALTOR® training programs for experienced REALTORS®: a "back-to-basics" model.
- Many brokerages offer periodic or ongoing sales training to their experienced REALTORS®, including Buffini, Wickman, etc.
- Some brokerages prescribe the training while in other brokerages REALTORS® can choose their own program.
- Some brokerages offer their REALTORS® brand training – access to brand university/courses.
- Some experienced REALTORS® attend brand conferences.
- A number of brokerages state they rely heavily on the PDP program for ongoing, formal education.

- Some brokerages access board training/conventions for formal training.
- Some brokerages run weekly, biweekly or monthly focus group sessions.
- Brokerages may bring in formal training on an ad hoc basis to address changes in legislation/council.

Approaches to Informal Education/Training: Experienced REALTORS®

Many brokerages stated that they provide some form of informal education/training to their REALTORS®.

Sales Meetings

The sales meeting is the most common method of delivering education to experienced REALTORS®.

- Most brokerages hold meetings weekly or biweekly.
- Some hold meetings monthly or an ad hoc basis.

Education content at the sales meetings includes:

- guest speakers: lawyers, accountants, mortgage brokers, home inspectors, developers, environmental specialists, specialized properties, other REALTORS®.
- brokers culling through various industry bulletins and newsletters, summarizing key points at the meeting and following up with question and answer periods
- changes to council/legal requirements
- ongoing issues with contracts, legal issues, and ethics
- excerpts from council disciplinary reports
- “sanitized” problems from within the office that could lead to discipline
- excerpts from *Legal Update*
- group sharing: marketing, prospecting, business planning
- case studies: review, analysis, sharing, discussion

The education component is typically led by the managing broker. Senior REALTORS®, managers, and trainers may also lead this component of the sales meeting.

A number of brokers stated that meeting attendance is a problem, particularly because REALTORS® cannot be required to attend as they are independent contractors. However, a number of brokers actively engage their REALTORS® in meeting participation through using humour; making the content relevant and valuable for the REALTORS®; holding REALTORS® accountable for meeting content; building a culture that values education and team work; combining meetings with social events; and providing food, prizes, and draws.

Ad Hoc Education Meetings

Some brokerages offer additional meetings that focus on education, including:

- “lunch and learns” to address a specific education topic or REALTOR® need.
- facilitated conversations on topical issues.
- weekly coaching sessions on soft skills.
- “just-in-time” issues.
- important changes to legislative/legal requirements.
- spontaneous education meetings in small offices as issues arise.

One-on-One Training/Coaching

- Managing brokers report that they review all contracts and legal documentation and many address issues with REALTORS[®] one-on-one if there is a problem. If the problem is happening with more than one REALTOR[®], the broker may address it with the whole office.
- Many engage REALTORS[®] in question and answer sessions with the broker/trainer.
- Many use opportunities for live instruction. An issue arises and the broker and REALTORS[®] work through it together or debrief.
- Many brokers report they are immediately available in person, by phone, email, or text if a REALTOR[®] has a problem.
- Some brokers adopt a coaching/mentorship style of leadership and actively encourage their REALTORS[®] to approach them with questions/issues.

Technology and Education

Many brokerages are harnessing technology to help with their education. Some brokers use email to:

- distribute highlights of information culled from industry publications, newsletters, and bulletins.
- distribute minutes from weekly sales/education meeting minutes.
- reinforce existing rules, acts, regulations.
- address urgent issues.
- inform REALTORS[®] of daily, weekly, monthly training sessions offered by brokerage and /or boards.

Other Technology

- Facebook groups or in-house discussion forums to discuss issues/questions and answers
- intranet, extranet, online resources, blogs
- texting
- DVDs, videos, webcasts

Training Provider

There are a number of different training providers.

- managing broker
- broker owner
- manager
- associate broker
- inside trainer (on salary or percent of sales)
- trainer from another office
- outside trainer, third party
- senior REALTOR[®] /local REALTOR[®]
- BCREA/boards
- managing broker and/or owner broker are likely to provide the training in smaller brokerages

Training Resources

- training centres
- both large and small training rooms
- access to training rooms, e.g., board office
- white boards, Smart Boards
- projector, TV/DVDs

- libraries of books/training DVDs
- brand resources: online courses, videos, books, modules
- in-house or trainer-developed resources: modules, case studies, templates
- BCREA resources: course manuals
- third party resources: books, DVDs, online courses, webinars, face-to-face courses
- Conferences

No Training

There are brokerages that don't provide any training outside of their sales meetings for a variety of reasons.

- They are a single person brokerage so there is no need to train.
- They are a small brokerage of competent, experienced REALTORS®.
- They recruit only experienced REALTORS® (send new REALTORS® to bigger companies).
- They only hire self-starters who will take on all their own training.
- They are made up of REALTORS® who are independent business people responsible for their own training.
- They don't have the resources to provide training.
- They rely entirely on BCREA/boards for training.

Informal Performance Review

Managing brokers review new REALTOR® performance more informally, on a “just-in-time” or “as-needed” basis.

Experienced REALTORS®

The degree to which experienced REALTORS® learning is assessed varies. While some brokers do no assessment beyond reviewing contracts, many conduct some form of assessment, including:

- weekly reporting
- regular check-in meetings
- assessments on an “as-needed” basis
- informal assessments on an ongoing basis

Some brokerages are proactive in helping their REALTORS® avoid problem areas by:

- discouraging them from working outside their area of specialization.
- stressing that they must do business safely and in compliance with legal/ethical requirements.
- reviewing contracts from outside agents; warning REALTORS® where to be careful and what to look out for.
- creating forms and templates for REALTORS® to use.

Some brokers report that they assess their REALTORS® on a reactive basis, i.e., when a problem arises.

Types of Assessment

Most assessment of REALTOR® learning falls into one of four categories: performance, observation, attendance, and interaction.

Performance

Performance measures can include:

- number of sales
- number of listings
- tour averages
- income
- complaints

Some brokerages have formal measures, e.g., if a REALTOR® is off the mark by 30%, he or she is red-flagged. Some brokerages review performance regularly, i.e. weekly or monthly with the REALTOR® and/or broker owner/manager.

Observation

Most brokers assess learning primarily by reviewing contracts and other required documentation. Brokers report that they, or a designate, review all contracts. Some look specifically at:

- contracts of REALTORS® who have had challenges in the past.
- contracts of REALTORS® who have language issues.
- common errors/trouble spots.

- odd or different property types.
- inclusion of all required documentation, i.e. FINTRAC.
- use of templates and standard clauses.

A challenge some brokers face is that often errors aren't spotted until it's too late and amendments need to be made.

In smaller brokerages, brokers report that they see all their REALTORS[®] daily so they know their immediate needs, challenges, and strengths.

Attendance

Many brokers also assess their REALTORS[®] through attendance, including:

- their attendance at weekly sales meetings.
- how much time they are putting in if they have a desk at the office.
- the completion of their required PDP credits
- receiving notification from an in-house training system about courses REALTORS[®] have completed .
- monitoring their overall efforts

Interactions with REALTORS[®]

Many brokers assess their REALTORS[®] through their daily interactions:

- through questions they ask
- through questions they don't ask
- through dialogue or conversation
- through email and text exchanges
- through their interactions with clients and other REALTORS[®]

Who Assesses REALTORS[®] learning?

- managing broker
- owner broker
- associate broker
- trainer
- bookkeeper
- conveyancer
- office staff

Sole practitioners self assess, i.e., research, look topic up in the Professional Standards Manual or the Legal Update Manual.

Remediation

If REALTORS[®] are not performing or demonstrating their learning, brokers reported they may do the following:

- flag problem contracts and follow up with the REALTOR[®] one-on-one by phone, email, text, or face-to-face

- follow up at sales meetings for common contract problems
- be frank with people about their performance, good conversations
- remind REALTORS[®] why attendance is important if the issue was covered in a previous sales meeting or training session
- encourage REALTORS[®] to call or be in contact on issues as they arise, not afterwards
- provide support, advice, coaching
- send them to additional training – either with new REALTORS[®] or as a part of “back to basics” training
- link them back to the in-house trainer
- let the REALTORS[®] learn through natural consequences
- withhold payment until errors are corrected and or documentation completed
- counsel the REALTOR[®] out of industry and/or terminate the REALTOR[®]

Question 3

What factors influence how you deliver training?



Brokerage Size

Benefits of small brokerages:

- allows for informal education
- allows for one-on-one training
- helps adapt training to individual learning style
- allows you to teach through lived experience
- managing broker is an active seller so has experience to pass on

Disadvantages of small brokerages:

- can't afford to have a trainer

Small brokerages in close proximity to a larger brokerage found that to be a training advantage.

Advantages of large brokerages:

- can afford to have in-house or external trainer
- non-selling managers so more time for REALTORS[®]

Geography

- access to courses more limited in remote regions

Learner Characteristics

- Type A personalities
- Some not willing to sit for long periods of time.
- Some have poor attitude towards learning, clients, industry; disinterested.
- REALTORS[®] are not academic, need practical application.
- Some have lots of previous knowledge, skills, ethics.

Trainer Characteristics

- background knowledge – instructor in APC

- experienced trainer on staff
- Managing broker has training experience in sales industry .

Brokerage Model

- remote working style – more directing people to resources than training
- Movement towards independent contractors makes training difficult to enforce.
- Movement from split commission to desk fees results in less money available for training.
- cooperative: can bring in experts when needed but don't need training
- have good brokerages systems in place

Resources

- availability of training system
- availability of brand training
- access to online university
- cost: return on investment for training is hard to determine
- access to a multipurpose training room
- good assistants, bookkeepers, conveyancers
- too many resources available: overwhelming

Culture

- Ethical and professional office results in fewer problems.
- REALTORS[®] pride themselves on learning and education.
- Positive culture; REALTORS[®] will help each other with hard skills.

Leadership Style

- Managing broker holds REALTORS[®] accountable.
- experience and expertise of managing broker

Legal Responsibilities

- Training on basics protects us; REALTORS[®] are independent contractors but managing brokers have a responsibility and obligation to supervise; this is in legislation.
- Use email to educate so message is clear and in writing; less likely to be misinterpreted.

Recruitment

- Corporate brand has a method/style of training; that's why people join.
- recruiting and retention: what brings people into our brokerage
- recruitment strategy: by experience, by skill set, by age

Technology

- access to online resources
- strong email systems
- texting/email allows for quick responses
- smartphones: "in the moment" training
- access to online training/webinars, audio-visual system, iClicker, especially in remote regions or for satellite brokerages
- ability to get information out in a timely way

- Are they leaving because they are not good or because the brokerage didn't do a good job of supporting them?
- Most REALTORS[®] are independent contractors but have no training on how to run a business.
- Need an "Introduction to the Profession" course; a lot of misconceptions about start up costs.
- We have a disconnect in our country with different provincial regulatory regimes in every province and a lack of sharing about what this professionalism ought to be.

Real Estate Trading Services Licensing Course:

Strengths

- Sauder is good, adequate; likes the accelerated course
- UBC's course sifts out the weak.

Challenges

- tough course
- Too easy. 100 multiple-choice questions; doesn't attract quality people and then have problems with quality and ethics down the road.
- Right now course is about memorization; should be about understanding.
- Too academic; a lot of REALTORS[®] aren't academic but are good REALTORS[®].
- Not practical; don't need to learn mortgage calculations and statements of adjustment; mobile technology has replaced those needs.
- Course is out of date; archaic.
- Doesn't teach a lot about selling real estate and ethical standards. Forgets about the people side. Talks about fiduciary responsibilities but not in context.
- should be more intensive on the legal front
- missing ethics, sociology and customer care
- gaps in basic computer training, office skills, and communication skills
- As a managing broker, I would like to see Sauder results; not just pass/fail but where specifically the student was weak.
- Should shorten pre-licensing, too long. Shorter academic period would let the better-qualified person be employed sooner.

Residential Trading Services Applied Practice Course

Strengths

- APC direction of concept of transitional licensee is good. Not signed off right away.
- getting better
- likes the idea of the new model allowing for mentorship; however, will be issues around competency of mentor

Challenges

- not practical, not coming out prepared; need more practical training to protect the public
- APC should occur pre-licensing
- weak on contracts and WEBForms; problems with contracts in the field, especially with new REALTORS[®]
- Retention isn't good
- needs an exam component

- People need ongoing support after licensing.

PDP

Strengths

- more than enough credits
- Most courses are good; like the mix of face-to-face and online.
- value to have PDP
- PDP is improving; big step forward; interesting to see how online goes.
- Courses are getting better now that they are more interactive.

Challenges

Credits:

- number of credits should go from 18 to 24
- double up on legal and regulatory requirements
- doesn't like model where points are determined by hours in class
- Quality and importance of content should be weighted more heavily.

Content:

- Courses need to be updated more regularly but otherwise courses are good.
- PDP needs to meet REALTORS[®] where they are at: want courses that have a direct impact on their bottom line.
- PDP not focused on its audience: REALTORS[®]. Needs to be more practical.
- gets repetitive for those people who have been in the industry for a while
- Courses are good but low retention.
- Courses need meat to make them feel worthwhile.
- would like to see fewer but higher quality courses
- Important to learn about laws and good framework for contract law, E&O, liability. Mike Ferry and power sales are not required in our market. Don't have to work for listings.
- need more education on client care from start to finish: where money is coming from at the end of the day and making them a life-time client

Instructors:

- need to have more ethnically diverse instructors
- Quality of instructors is uneven.
- Would prefer instructors not read manual at courses; group discussion would be more valuable.

Delivery:

- Generational differences: online might be better for the under 40.
- PDP is challenging for the smaller regions; hard to get to courses and expensive to travel. More online options needed.
- Online PDP: 6 hours too long for a course in one sitting.
- don't like online
- would like to see manuals sent in advance of courses
- doesn't like webinars; need group dynamic, interaction
- Concerned about online PDP – are we setting ourselves back if we get away from doing live presentations. Problems with accountability.

Flexibility:

- need to be able to develop their own learning paths
- Courses should be flexible to allow for different learning styles and paces.
- more night courses to fit into work schedule

Assessment:

- PDP should include assessment/testing; people are not accountable and are off task.
- Online is better for assessment/accountability.
- Courses could be more concise; instructors like to talk.
- Assessment needed; industry is against this but could be as a follow up – six weeks later, ask what they learned. Right now there is a disconnect.

Other:

- PDP is a money grab; doesn't enhance professionalism.
- Boards need to get out of PDP – just offer a venue. It's too complicated and too self-serving. Boards have become the great enabler of bad business models: offering training where brokerages have opted out. Going to fee-for-service model.

Future Models

- You can't have such low levels of entry/education and expect to be considered a professional; other professions require degrees and articling. That is what is needed to raise the level of professionalism.
- A more tiered system as you become more skilled, as you go through system you will have the proper skills to be licensed.
- Make the Sauder course more in-depth – possibly a diploma program.
- not interested in mandatory articles or mentorship
- would like to see six month probationary period; should have to go out with a REALTOR[®]
- Europe follows an apprenticeship model. Would like to see that here. Problems, mistakes, and lawsuits could be avoided if the model changed. Here they learn from a book and APC and must try to survive.
- would like to see a qualification process for brokerages to sponsor new licensees
- would like to see REALTORS[®] work from office for the first year but can't enforce that
- Industry should ensure that there is a minimum level of supervision based on number of deals you do. Make sure the managing broker can adequately supervise.
- should be greater system of national standards; higher standards under the REALTOR[®] brand
- Membership comes with expectations and responsibilities.
- We need a higher set of standards than what the regulator has in BC.
- need to deal with succession planning

- BCREA can give managing brokers the tools, but managing broker follows up. Managing broker is responsible for that person.
- Brokerages do it as well, but some don't do this.
- BCREA is responsible for overview of education in primary areas, competencies/foundational knowledge. But our brokerage training is more case study focused; hypotheticals; bringing in a strategic element to training; messages can be reinforced, i.e. BCREA does rules of advertising and member boards and brokerage provide own perspective from same topic.

REALTORS®

One broker indicated that these skills are also the responsibility of the REALTOR®.

- Both the REALTOR® and the brokerage: REALTORS® need to take a more serious stance on their profession.

B. Soft skill competencies, such as prospecting, marketing, and sales

Interviewees were more divided on who should be responsible for soft skills training.

BCREA

- Would like to see BCREA/boards take this on. Basically, the more education provided, the better.
- Would be a good service to the industry if BCREA took these courses on, but not make them mandatory.
- Could make existing training by other available (accreditation) rather than creating courses that are there already (repetitive).
- There is a lot of duplication in this area. Okay for BCREA to offer soft skills training if it is fully cost recovery. They should not offer soft skills if it means fees/course rates go up. There is a lot of duplication in this area.
- Should not be part of mandatory education; these courses should not qualify a person for their license.
- BCREA should get into soft skills training because there are offices that don't have means to supply these courses, so significant numbers of REALTORS® don't know this. Doesn't hurt our competitive advantage. Other managing brokers in this company may feel differently. Not just looking at our office but the overall improvement of our industry. Would like to see larger success rates of REALTORS® trained properly. REALTORS® may be capable but have not been taught. The massive training program of 100% clubs have gone by the wayside (Block Brothers/Realty World).
- Not concerned if BCREA gets into soft skill training. Franchises will never allow it. Training is their ace in the hole. Would be great if franchisers did it but their soft skill training is all about recruiting but is not good enough. If you get past franchisee, the sales people would actually like BCREA to do it. They must go to private sector and it is very expensive. Concerned that this is too big of a hill for BCREA to climb and they don't have the mandate.

Brokerages

- responsibility of brokerage/franchise
- Not BCREA. They should provide more product-oriented classes, though would like to see a basic "People Skills" course.
- BCREA should stay out of this. If brokers don't do training, that's their problem. Some run extensive training and BCREA shouldn't step on brokerage toes. Small brokerages – tough for them – they could join a franchise that has awesome training.
- Brokerages. That is their competitive advantage. Competition in the industry is okay. We don't all have to be homogenous.

- Brokers should concentrate on this training.
- Brokerage level. There are so many people already offering these programs and REALTORS® must make it their own. You can teach a sales process to a large group.
- If BCREA gets into soft skills, they are encroaching onto brokerage territory and treading onto competition bureau areas. Is BCREA in fairness going to teach cut-rate commissions? That is the brokerage uniqueness. Keep soft skills training related to legal components, e.g., pitfalls in prospecting.
- Not sure BCREA needs to put time into this sort of thing. Brokers need to do this for our own companies and REALTORS® for themselves.
- There is tons of stuff available from third parties. BCREA does need to be doing it. Knowledge is readily available.
- Brokerages and external people that brokerages organize.
- Brokerages. Boards must stop enabling and leveling.

Both

- would like to see this as the responsibility of both the brokerages and boards
- BCREA and franchisers, if they want to pick it up
- BCREA can do these courses but they shouldn't be mandatory. Big brokerages have the resources to offer these, but small brokerages that can't, might use BCREA.
- concern that attendance won't be great if BCREA/boards do this training
- Any opportunity to teach something is of value. Just because BCREA/boards offer a course, doesn't mean REALTORS® have to take it. If their company offers an in-house course, that's fine. Some of the national franchises may feel differently, but smaller companies don't have the means to run programs.
- Merge of BCREA and brokerages. Courses like *Working with Buyers* must be taught uniformly, because ethics are involved. Not concerned about BCREA's soft skills training impacting our competitive advantage. Our brand's market control isn't connected to soft skills. National Association of REALTORS® had a program of 24 sessions that I used to use with new sales people: how to write an ad, show a property. Would be good to have a uniform program for everything to learn the basics. REALTORS® can get this from our brokerage, but not the same for smaller brokerages.
- Both. Could be covered in the post-licensing course. Would give agents a fighting chance. With offices more fragmented, we may need it. Likely no training with big offices. Want REALTORS® to be successful. Probably BCREA has a role initially. Could offer this online at minimal cost. Maybe soft skills could be elective and not subsidized.
- BCREA and brokerages: some brokerages do some training but others do nothing. The victim is the agent who picks the wrong brokerage. Training is hit or miss at the brokerage level. People spend a lot of money and put a lot of hope for the industry and end up leaving it. We need a higher training authority. Even if your brokerage offers training, it is always good to hear other perspectives from someone else. Hear different messages. What's important is that new REALTORS® understand.
- The more training the better. The more skills my competitors have the better we can be as an industry. The more people not well trained will pose a challenge for the industry and everyone involved. There is a collective benefit for BCREA to offer soft skills training. Education is a cost to a company so lots of companies have dropped that component. No direct return. In the 70s and 80s, it was more of an advantage to offer education. If brokers aren't prepared to invest, I'd want organized real estate to step in.
- There are lots of places where this is available. It is brokerages' responsibility to teach their people. BCREA should have a program for this as well.
- BCREA courses, the franchises, or managing broker should see REALTORS® are competent in those areas.

- There could be a place for BCREA to offer these courses. Big companies have them but they are aimed at promoting the company's brand and not really about professional salesmanship. Many REALTORS® lack general sales skills, and if you are not good you leave the profession. Small firms rely on PDP.
- BCREA should not be teaching soft skills but how to take an ethical/legal approach to doing them.
- both, but at different levels
- This is the REALTOR'S® job. They should seek the training: office, convention, or PDP.

C. Competencies related to specialized properties: green building, strata, and hazardous sites

Most brokers indicated that BCREA had a role to play in training on competencies related to specialized properties.

BCREA and/or Boards

- Not sure if it is BCREA's responsibility but it would be good to have BCREA at the centre disseminating accurate information. Maybe dealt with at board level.
- BCREA should deal with strata because it's a provincial issue. Would like to see more courses on different types of strata and tenancies.
- So much content, it's hard for individual companies to do this well. Organized real estate should take this on because it creates better standards and more consistent knowledge base.
- Strata at a minimum should be mandatory. Should have these courses as a minimum.
- No one else can do it from a cost/benefit perspective.
- These are provincial issues. Stick to federal and provincial topics. Optional/online material would be good here. Don't need an instructor to run it; doesn't have to be high cost.
- BCREA has a responsibility in this area. They may or may not create the course but they have a role in seeking out the expertise.
- BCREA has a certain responsibility here and it shouldn't be haphazard. You should have a designation in a certain area to sell that type of real estate. Transact real estate outside of your area and you don't understand the issues, putting clients at risk, (i.e., aboriginal lands, septic, wells).
- Tie required courses to specialized properties. For example, if you deal with strata properties, you have ongoing education related to them. Similarly with foreclosures. People who deal with specialized properties once in a while put the client at risk. REALTORS® put the onus on the managing broker to cover everything. In other professions, like law and accounting, you refer out when something is outside of your specialty.
- Best for boards because they are local issues.
- Probably more the responsibility of local boards. They know the issues: septic, oil tanks, wells, and hazardous materials.
- Maybe a board issues, because issues are tied to certain regions.
- Must be regionally appropriate and relevant: i.e. strata less important in smaller regions; concerned needs of smaller regions would be ignored. For example, issues with mobile homes. Maybe best at boards or a board component. Perhaps BCREA could help get resources and advocacy.
- CREA: National, BCREA: Provincial, board: regional

Brokerages

- Managing broker: managers should know enough to train and talk to REALTORS®.
- This is where the brokerage adds value. If brokerages are not teaching this, unprepared REALTORS® can get public into trouble. Brokerages should do this. Dig for the information and provide it. The brokerage is responsible so has to teach it.

Both

- BCREA deal with provincial topics (they can do this more consistently), like grow ops, and broker deal with local issues.
- Could be done by BCREA or regionally, by boards. Brokers also do a lot of research in this area.
- dual interest: BCREA on behalf of council and at grass roots level, the managing broker responsibility
- continuing pro-D by BCREA; brokers sending reminders to REALTORS®
- BCREA with managing broker overseeing.
- both, but at different levels

D. Customer service competencies: minimal levels of customer service associated with the REALTOR® brand

Brokers were divided in their responses to this question.

BCREA

- Mechanics of it would be useful with boards offering ethical issues/courses.
- This is the code of ethics. Not a bad thing to have a course on this; puts some value on it.
- BCREA could offer at 30,000 ft view. Teach the REALTOR® model we'd like to see and the public value.
- not convinced this course will make people better REALTORS®
- If BCREA and council were to step up and improve initial education, then it will naturally increase the value of the REALTORS®. If you go the line of minimal levels of service, you will walk down road of competition bureau. Won't work.
- Should be part of pre-licensing. BCREA continues post-licensing and continues to each them. Need a level of service or else reputation will go down. Trade association needs to take over. Companies should individually be talking about their minimum standards but that doesn't happen.
- BCREA should build on what FVREB has done on the value of a REALTOR®.
- Would be hard to get industry consistency on this. Be careful not to water down the value of a REALTOR®. REALTOR® branding is critically important and can be clearly established: focus on co-operation, fairness to all, ethics, and integrity. This isn't anti-competitive. Stay big: responsibility to the consumer equals greater success for all. Not about teaching but getting people in a room and asking where your brand is being damaged. We can set standards for memberships. You can't create rules to create barriers to membership, but you can define your value proposition.
- provincial guidance on co-operation
- Could be BCREA – this is long overdue. New people are self-focused and don't understand they are working for a client.

Brokerage

- Role of managing broker is to deal with complaints and get a resolution for both parties.
- Council issue and brokerage: It's tied to ethics and BCREA shouldn't get involved. It's costly and hard to police.
- Not BCREA but brokerages. Let people do their own branding. If BCREA does something like this, tie it to legal requirements.
- Not BCREA. Part of brokerage branding. If you don't do customer care, you won't be successful.
- Not sure it's up to BCREA to worry about this or individual companies. If BCREA does it, it's a slippery slope.

- It's a council and brokerage issue. It's tied to ethics. BCREA shouldn't get involved. It's costly and hard to police.
- Brokers should concentrate on this.
- opposed to being told what to do from a competitive point of view
- Probably not BCREA. In an ideal world, this would be wonderful, but starts to become subjective. Practically this is hard. At the end of a day, it's just another course. How do you implement it? The market place ultimately decides who is competent. It's a lot of development for low impact.
- Brokers and REALTORS[®] will push back on this one. Big brokerages will see BCREA competing here.
- Brokers. We have a mentorship program for new REALTORS[®]. Would vehemently oppose BCREA coming into my brokerage and telling us how to do this.
- If anyone is going to do this, it better be the brokerages. Business doesn't work this way. It is an individual decision of the REALTORS[®] what their own minimal level of customer service is. There is a lot of training around. BCREA should not be trying to make cookie-cutter REALTORS[®].

Both

- BCREA, brokers – both
- both: BCREA to a minimal level; brokers to an advanced level

Board

- Like what my board is already doing with this: putting ads in the paper about what the public can expect from a REALTOR[®].
- At a minimum, the board; BCREA could take it a step further.

CREA

- REALTOR[®] brand competently delivered by CREA. Let them do it.
- CREA does a good job of the value of a REALTOR[®].
- That's marketing: REALTOR.CA. Challenge is that there are too many bodies in real estate: council, board, CREA, BCREA. If BCREA sets up to the plate on this they must make sure their REALTORS[®] are professional and focus on the difference between a REALTOR and licensee.
- a lot available from CREA on this topic
- CREA does a terrible job of communicating the value of a REALTOR[®].

Not Sure

- Yes, this needs to be taught. Not all see themselves as "REALTORS[®]" – most see themselves as licensees. Not sure who should teach this.

E. Competencies related to running a small business, such as basic accounting, reading financial statements, managing a budget

Brokers were divided in their responses to this question.

BCREA

- Love it. Took at course at the board years ago on how to record business expenses for tax purposes and still use these techniques. Perfect for a new licensee to take a course like this.
- Brokerages have own courses on these but it's a great idea. Optional not mandatory. Online formal. Some upfront investment but doesn't have to be expensive to run.
- Yes, this would be a good thing. I'm an accountant so can help REALTORS[®] in this respect.

- BCREA could try to see who they get. Could be touchy with big franchisers.
- Skill level on this is brutal. This should be a requirement before they come into the industry. Probably some PDP on this through BCREA. Those that treat real estate as a business are successful; those who don't aren't.
- BCREA absolutely. New REALTORS® are like lambs being slaughtered. REALTORS® have to sort out a budget/least expensive ways to get started.
- Would be great if BCREA could do this. Part of training at our brokerage. Turnover rate of new REALTORS® is high; there is a lack of awareness of running your own business. Need simple basic skills.
- Not offensive for BCREA to do this. Maybe this should be taught at Sauder stage.
- should be taught as part of a two-year diploma program for licensing
- Yes, good idea. Many REALTORS® think they are just a sales person, but few think they are running a business.
- Make it practical and quantifiable. No ethical or moral issues attached.
- Need for REALTORS® and managing brokers. Franchise used to put on an intense week seminar on this.

Brokerages

- Probably best at the brokerage level because it's very difficult to implement practically. Hard to get a group together in a way that doesn't have anti-competition issues. Might invoke dangerous conversation.
- Brokerage has own course in-house. This would be a big/horrendous undertaking for BCREA.
- Stepping on brokerage's game plan. Brands offer this kind of training.
- Brands – we do this for our REALTORS® and charge a monthly fee.
- Managing broker. This has nothing to do with BCREA. We should not waste BCREA money benefitting the broker who just rents an office.
- We did offer an accounting course and it worked well.

Both

- This needs to be at the managing broker and BCREA levels. Teach them about the small business they are running: budget, prospecting. Unless you have money, you need a business plan.
- BCREA and brokerages – depends on the brokerage. Some just interested in recruiting as many REALTORS® as possible No one works with these guys.
- both, but at different levels
- Grey area: brokers train on this, but a good course for BCREA to put on as well.
- not really about a division of responsibilities but a drill down

REALTOR®

- No, the same issues exist in all small businesses. Ideally, REALTORS® should be seeking this in advance. It's part of career planning. There are experts out there who can provide this.
- The REALTOR® is responsible for getting this.
- REALTORS® are independent contractors so it's their responsibility.

F. All Competencies

BCREA

- Our office doesn't have anything in place for ongoing education for REALTORS® so they do look to BCREA. Happy to see mandatory education.

- Proponent of BCREA or another outside agency doing the training rather than leaving it to bigger franchises. You may not get consistency or accurate information. BCREA is the body and it's doing it well.
- BCREA could get out of delivery but not of being the provider. Narrow the offerings: sub-contract or accredit their party providers
- BCREA should offer all education across all competency areas. Then, education is consistent to all REALTORS[®] regardless of where they live in the province. 90% of REALTORS[®] don't have good training, even with brands. Need something consistent.
- BCREA should be teaching all of this. Managing brokers are not qualified to teach these skills and the teaching should be consistent throughout.

Brokerages

- Managing broker should be overseeing all of this; they are the most important person in this process.

Both

- Do not see any division of responsibility: all should be working on this together to ensure REALTORS[®] have educational opportunities. Very open to alignment.

nothing magical about board vs. BCREA vs. brokerage. All education is good. Boards are afraid of losing control if brokerages offer training. Get rid of credits. Who cares where it comes from? If brokerages offer, broker signs off. Have to trust. If a REALTOR® gets in trouble with council, then they should come down harder on broker and have to take more courses.

- Yes, big time. Some courses are awesome. BCREA could audit courses. Last new REALTOR® came back from taking a brand course online from college and felt like online course was better than PDP. Small brokerages may not like this. We can't compete with low desk fees but can offer education. Like that board events are now getting credit. FV bringing in Chris Hadfield - about overcoming adversity. Not getting into meat and potatoes of business.
- Yes, but can see this being difficult to do. Brokerages would have to go through an accreditation process first. MLS exchange should be accredited. Biggest tool REALTORS® have and they don't know how to use it. Might get more participation from REALTORS® if in-house courses were accredited; even if worth a smaller percent. A lot of conversations about people taking Buffini, etc. It's worth something to them.
- Yes. They have a corporate university.
- Would be great. Not sure how it could be assessed/implemented. Would be comfortable with BCREA looking at materials/auditing a course.
- Yes. Some of larger companies that brand training and sell training would like that and this might alleviate concerns some companies have about organized real estate. It's education; they are invested. There's a benefit. Anything that adds value to education is good. Might be a good way to get people interested and you get credit. Value for showing up.
- Yes. Would also like to offer PDP in-house directly from BCREA – not go through board. Can teach PDP courses; can get 20-30 people in office to teach; but right now I must pay full course to board; should be able to do in house. With boards controlling at full fee there is a flaw in the business model. Get boards out.
- Individually would be okay but difficult to manage. Better for larger brokerages. Maybe in smaller camps? Would be great.
- Category "C" would be okay. Fill boots, whether or not there is credit. Builds morale
- Make senses – not too good for smaller office. These would be much like webinars – not difference
- Be good but hard to do. Hard but interesting.
- Yes, okay. As a small broker, I wouldn't do this but its fine for the bigger brokerages. Other brokerages invite us to see their speakers - recently main office brought in Brian Ferry – whole office came and joined. Small town. Should be more cross-training between offices in small towns.
- Yes I do. Especially in our area, it would be a huge advantage. Seeing that I try to bring in valuable people to do seminars and workshops, it would be very valuable.
- Sure. Compliance would have to be an approval process. Write synopsis, get it approved for credit. How do you get the brokerage to be honest without sending someone out to monitor the course?
- Yes. Value in the training. How to make it work??

Disagree

- No – just industry standard – want them to take extra courses at board. If brokerages offer courses people won't take extra ones through board.

- Too much work on BCREA's part to validate. Overhead involved is high. Nice idea but not practical.
- No. Ran an education program at a big brand office and they produced courses that were poor and ethics within them debatable. In-house courses are self-serving.
- Don't agree. You would lose control over standards; no benefit to the public.
- No, the PDP becomes weaker. At the moment, there's a standard; it's controlled. If you give credits to different brokerages, you weaken message and get brand standard. Must be some type of quality control. Minimum level of quality. Too brand specific. Some training messages are corporate related.
- No, in-house training programs shouldn't be about qualifying for PDP credits. You do them to make money. BCREA PDP program is an industry viewpoint not a company viewpoint. Trade association help you to know how to treat business properly.
- If they were big enough courses, would already be looked after by PDP, anything in-house is a reassurance of what BCREA is teaching.
- Could get out of hand, be misused by the broker. How would this be managed, how would BCREA make sure these are all qualified courses for PDP credits?
- Not fair for smaller brokerages – other REALTORS® can. BCREA and board must be careful not to favour business style, size of business models. Harder for smaller companies to recruit and education shouldn't be bias
- N/A too small. But no. You should have to take BCREA – everyone get same education.
- No. The process for accreditation would be too onerous.

Maybe

- Only if BCREA can monitor and it's not hokey. Would be good at board level - bring in people on issues like asbestos. Good to get credit for that.
- Only if it can be verifiable and quality. Not just a license to print PDP credits. Some brokerages that have economies of scale can do this. There is no competition from big brokerages in this board - we are all small. Some brokerages invite REALTORS® from other brokerages to see speakers. Big question will be how will BCREA monitor the program effectively? How will it be evaluated and what will costs be? Sounds like a great idea but not sure it is feasible and best use of BCREA's time and money.
- Not sure. Minimal value, maybe, but must be monitored for quality control.
- Value in going to outside to get good mentorship people. There are good speakers currently available. PDP needs to let their instructors be more motivational, not so scripted. Already set up in our office, could offer those as accredited programs.
- If it were policed, yes. But if not, no.
- Maybe. This office is too small. If you did do something like this it would have to be generic so everyone could benefit. Could become a recruitment issue - where does recruitment stop? Could work with some specific companies.
- Depends on what kind. Could see brand university courses being accredited. BCREA does not have enough resources to accredit all the courses that will come their way. Do I see value? Yes. Is this practical? No. Currently to bring PDP in a large brokerage is expensive. Maybe a need for this in remote regions. Doesn't believe offering in-house PDP will be a recruitment advantage. Would prefer

REALTORS® go out to other locations and network in addition to learning. Definitely accreditation for third party providers.

Resource development

- Some structured education pieces that are delivered in offices don't have to be for PDP credit, e.g., sales meeting materials. BCREA could make packages to be delivered, of a high caliber, to be used in office meetings. Chunked video is the best.
- Would be good to have something through offices – videos, like David Knox – with video, handbook, and 2-hour module. The right person needs to develop it – maybe BCREA. Provincially developed resources but delivered locally, in-house.

Negative comments about the funding model include:

- don't like the way it's funded
- Funding model should be full cost-recovery.
- Most people feel they have no choice. Realtors don't like it.
- not happy with the current model
- It used to be better. I don't think we get funding from foundation. Costs have doubled. If they are going to put the onus on us to have this, it should be covered.
- Not a big fan of a subsidy model. E&O was a good value at start. Cost of education is inexpensive.
- Course costs have doubled. Don't know why.

Unsure:

- Torn on this one, yes and no. Like some aspects, don't like others. Education is too convoluted and wrapped up in our politics, and we are over regulated. Education and regulations overlapping too much.

How could it be improved?

Some interviewees felt:

- there was a need for higher grants, and more grant subsidies for remote regions to put on courses.
- if more training were to be coming from brokerages, then board fees would need to be reviewed.
- PDP should be on a cost-recovery basis.
- the true cost of course should be paid by REALTORS[®].
- the courses should cost more.
- the courses should cost less.
- there should be a "cost per REALTOR[®]" funding model.

Suggestions for improvement included the following comments:

- Some subsidy is a good idea. BCREA should develop as efficiently and inexpensively as possible. Look at segmented costs. Required legal and regulatory courses mandatory with a great subsidy. Sales and optional courses could be twice the cost. You need mandatory courses to meet professional requirements. Sales side is more of a direct benefit to the REALTOR[®].
- Don't think that Foundation's fees should subsidize education. Come from trust accounts so should be used to benefit better programs, like housing for the poor, rather than education. Even if fees go up in order to subsidize education. That's okay.
- If REALTORS[®] had to pay all themselves, you would have a tougher time to get them to go, especially when it's mandatory education.
- Quality should improve too. With existing courses, you have to take repeats to get credits. Likes 3 credit courses – quick hit and run – okay with number of credits; selection issue. Manual, if you read it, you'll learn something. If you just gloss through it, you'll miss important information
- Believe in having subsidies for mandatory courses like *Legal Update*. You do get a bargain in education. Like the idea of subsidies if it keeps fees reasonable. You will likely get more attendance.

- Concerned that if BCREA expands its offerings, fees will go up. In urban centres, BCREA is competing with real estate boards bringing own courses in; full cost could be a barrier to assortment of courses for live delivery; full cost will vary by region – have to be a subsidy always for remote regions. EO grant subsidies so remote areas can put courses on.
- If price goes up, REALTORS[®] won't be able to afford the courses.
- Doesn't need to be further subsidized than it already is. Doesn't really support a subsidy model.
- Recently, BCREA got all boards to approve \$3/month/ REALTOR[®] across BC in annual dues to increase the funding to revamp PDP. Other option is to increase course fees. Big believer is to pay for what you see. Don't like hiding in fees. Cost recovery basis – leads to being a profit centre if you hide in fees. Like no subsidy and REALTOR[®] pays full cost. Keeps BCREA from making a hidden profit. Goes to value.
- Would like to see a cost per REALTOR[®] funding model. That way you know who has the money. Its REALTORS[®] not boards.
- Get away from empire building. BCREA coming up with new courses to justify their education division. Can be self fulfilling.
- Shouldn't be offered for free; lowers value. Subsidies and E&O are good, too. Sends same message. Good business decision to keep costs as a low as possible.
- Maybe courses could be done more cheaply. Maybe more online. Concerned about online pass/fail and what that might mean for licensing.
- Courses should cost more. There are so many people in the industry that don't want to pay money or be invested in the game. They choose to go to brokerages where there are no services. People don't know how to do things, so they go to boards, BCREA to get training. Requires more courses and becomes more expensive for everyone. If members aren't willing to put money into a course, why are they a REALTOR[®]?
- Some courses should be available to all licensees, whether or not they are members of boards. A non-paying member should be able to access those courses but at a higher fee. BCREA needs to take a more hands-on role in differentiating themselves from non-members. Maybe not all courses need to be subsidized.
- If it's free, it's worthless. If boards/BCREA wants to move ahead with improving their image, must put money in it. If REALTOR[®] wants to move ahead, must put money in.
- Concerned fees are going up. Looking forward to new courses. Don't develop unnecessary courses – combine two courses where possible to minimize cost.
- Use better quality instructors. Webinar courses, too, are good as opposed to face-to-face; off topic, not on point, can get boring, skip lunch – make it three hours – no need to do lunch. Makes costs higher.
- Fewer subsidies wouldn't be a bad thing but still mandatory education. Those individuals that aren't interested in training are paying for others.
- BCREA needs to take complete ownership and just rent space from boards. Boards shouldn't be intermediaries. Lack of uniformity in way PDP is delivered now across boards. In some boards, it's extremely subsidized. In larger boards, there are higher fees. Buy courses from BCREA and up costs. Careful, there is a view that making courses too expensive is a way to weed trash from business. They won't want to pay money to license. Fine line. PDP – value for what you get. If opening up to other

learning opportunities, that would go a long way. It's about REALTOR[®] responsibility and not fee. If I attended board of trade meeting and produce receipt, I'd like to get credit.

- Concern that some areas of the BCREA management are subsidizing other areas of association management. Costs should be clear reflection of what it "really costs" – for that segment of association and billed back in proper way. Good to know the true costs.
- Delivery of the message could be less dry, more motivational.
- Higher grants from RE Foundation and E&O.
- Always room for improvement, technology is the biggest thing, have to keep abreast of it. Technology is to help us with our work, not take over.
- True cost of course should be paid by REALTORS[®]. Other money coming in should be for research.
- Yes, get rid of all the managing brokers and half the regulations. Too many levels of control, brokers, boards, BCREA, CREA way too much. Should start at the bottom end and top end and lose many of the regulations. If you took out half these people how much money would be available for training and networking. Too many layers.
- Yes, in the old days REALTORS[®] didn't pay for the courses, and then they would all attend.
- More grant money should be applied to education.
- Yes, should be improved, should not be subsidized anywhere, this is the real cost and if you choose to get nothing out of it or if you get nothing out of it, you have the right to complain and get what you need.
- Make it cheaper.
- If more training is coming from brokerages, board fees have to be looked at.

Does your brokerage contribute to the costs of PDP for your agents?

- Most brokerages do not contribute to the cost of PDP for their REALTORS[®], but those that do tend to provide funds that can then be reimbursed, or reimburse REALTORS[®] (partially or fully) once they have successfully completed the course.
- Some brokerages do not pay for PDP but will assist with external training costs – often as a "thank you" for the REALTOR'S[®] attitude, production, contributions to the company.
- Some brokerages include training costs in fees, or are on a split commission business model, and do cover some or all of training costs.

Question 8

How could professional development opportunities for managing brokers be improved?



Responses to the question of how PDP can be improved for brokers elicited comments about general improvements and specific courses:

- There needs to be some choice for brokers, the current model is very repetitive.
- The content of current courses is targeted too low for brokers.
- The quality of the instructors is uneven.
- They want more interactive and motivating professional development.
- There should be different credit options for brokers, such as facilitated discussion groups, panels, webinars, and a category for credit re: industry/community involvement.

Specific courses for brokers and the need for ongoing information/resources to help them with their in-house training are also discussed. These are outlined in detail within the body of the report.

Comments

- Some courses for brokers:
 - How to run a profitable business (managing broker version and a REALTOR[®] version)
 - How to Retain Your REALTORS[®]
 - Managing Broker Business Processes and Systems:
 - What paper work should you ensure is included for a listing?
 - Checklist, etc.
 - Steps for conflict resolution.
- New brokers come in and they don't have basic information.
- Regional managing brokers do get together annually and bring speakers in or have topical meeting - like asbestos, vermiculite. They come with questions and ideas.

- Real Estate board does put on a good seminar on FINTRAC audits. Not accredited. Managing brokers need ongoing training in forms because they change so much.
- PDP pretty good and meeting needs but would like to see more online.
- Would be nice to see some broker oriented courses at a higher level for brokers.
- Like current course availability through PDP. STOP program good - where sales people can get into trouble. Hazardous materials course. More on FINTRAC - need someone from FINTRAC out to speak.
- Maybe some specialized courses for brokers, but ones offered are good: Legal Update, Contracts, Buyer Agency are good for brokers themselves as well as for sales reps; want courses to be mixed with REALTORS[®]. A lot of brokers don't sell so don't know what's happening on the ground. Important thing for broker to know. Need to stay in touch with what's happening.
- Do need something on brokerage aspect: running the business. Challenge with PDP courses is they get repetitive.
- Sheer, technical aspect, legal aspect. Conflict resolution. Manager broker stuff - want content applied to my role. Staff management, human resources, *Legal Update* preview.
- Helped to rewrite the managing broker course at UBC. Content has depth. UBC course has to protect the public and focus on legal side. Managing broker PDP credit requirements should be annual rather than biannual, especially Legal Update.
- Broker networking opportunities are more valuable than training. Meeting with council and regulators is good. Facilitated conversations with experts/round tables, which are accredited, would be useful, i.e. , why commercial is different from residential.
- Sometimes people are in managing role without skills; a broker may have been licensed a long time ago, not licensed and don't have up-to-date information, or managing more than one office in different regions. There is a problem with *Legal Update* that you can't cover all the information.
- Could do a broker preview course. Instructor could start by doing a 10-minute summary on each topic and then group decide where they want to drill down based on need. Doesn't think *Legal Update* needs to be delivered by a lawyer. MOST important is that you have a good instructor.
- Would like a broker specific course once a year on legal issues/requirements, i.e. FINTRAC requirements, office management issues. We get emails but would prefer a one-day course. If it were the whole of VIREB and once a year at board office, cost would be low and worthwhile. More benefit to keep smaller companies in the loop. Bigger companies pay people to pay attention to new issues.
- Would like more available online. Would be nice to go online and have a summary of key points to remember related to specialized properties or legal issues. You may not do these types of transactions regularly so need reminders. Something focused on what the REALTOR[®] needs to know: key bullets, bite sized. Just in time. Sometimes PSM isn't REALTOR[®] focused. Same with PDP. At end of class, there are 6-8 key points that were covered. Could these be made available somewhere online?
- Sufficient as it is for experienced brokers. Learning from newest people in business. Specialized courses for brokers, i.e. Legal Update for commercial. Not enough courses for new managing brokers.
- Feel the courses currently meet experienced broker's needs. Concerns for younger brokers. Could be a need for some courses on relationships and how to manage in an industry dealing with independent people and not employees. Yes, for younger managing brokers – short courses on soft skills, conflict resolution.
- Need more courses catered to brokers. Some good ones now: conflict resolution – absolutely crucial that every broker has taken that. How are people managing – between sales and between offices? Whole slew of other potential courses strictly for broker. Conflict resolution – designed strictly for broker.
- Running office meetings – how to do them. Huge opportunity.
- Supports idea BCREA 10 minute education piece / material for meeting.

- Only so much you can do for office meetings. Do a lot of research into YouTube for comic relief. Humour, value, food will get people to meeting.
- Not a lot of selection for brokers. Good one-day session on agency disclosure. Can use same courses but for brokers. Brokers need to be personality readers, good communicators, motivators. Maybe you can teach these skills.
- PDP is not useful for the managing broker. Not a big disadvantage. You can buy courses externally and company you work for can offer them. Would be interested in topics like how to run a successful business, how to do conflict management, recruitment, budgeting. Conflict management is big. Deal with different characters. Conflict management for REALTORS[®] to REALTORS[®], for client to REALTORS[®], and for broker to REALTORS[®]. How do deal with money.
- Finds courses are regularly updated. *Legal Update* always changes and strata act changes. Likes courses that involve legality. Title search course was useful. Help him help REALTORS[®].
- Taking same course as membership is good. Can see what they are learning/teaching. Specific courses for brokers would also be good. Take them at a higher level, more in-depth. See course from a different perspective as a broker. Designated Agency for managing brokers was good.
- Broker learned most of what he knows about trust accounts not from training but from a council audit. Need training for brokers on trust accounts and how to manage brokerages. Need an in-depth program, with case studies, fictitious brokerages to work through process. Also needs skills to resolve disputes. There is some PDP on this but a three-hour course won't make you an expert. Need a more substantive weekly program with homework. Floyd Wickman sessions - if you didn't do your homework he'd kick you out. Accountability. Other topics: how to recruit by need; how to conduct training programs.
- Yes, courses for brokers: Planning, How to Train staff, How to motivate, how to budget, finance. There is nothing on these topics through brand. There should be at least one mandatory broker course every cycle.
- New team lead isn't coming from industry but from professional hockey. Goal is to bring in a team leader/motivator. Will have to get real estate license and broker license. Will need courses on legal, accounting, human resources.
- Like what I see. On the right path. Like education paths. Courses needed for training managing brokers. They take required licensing but not a lot of extra for them. Risk management courses for managing brokers would be valuable. Skills that they need to have day-to-day – risk management. Branding courses for brokers doesn't have to be that different from existing courses–tweak. *Legal Update* used industry wide and brokers aren't the problem in industry; usually prepared to update education.
- Want credit for contributing to industry: creating and giving away protection of public forms. Attending board of trade events. More expanded learning opportunities. Want credit for advocacy work: meeting with MLAs, attending city council meetings, government relations pieces. Look at professional development as opposed to education. Category B – how to do advocacy effectively; understanding process – and C is doing it. Hoping for more core education directed to brokers – opportunity for brokers to get together as an incentive to talk to each other about issues. Get credits. Learn from each other.
- Value added in succession planning – accounting firms and law firms in succession planning – how to value business. Succession planning: big issues there.
- Not an online community, too much online stuff already. Lost contact with who we are.
- Would like to see more about how to run a business, business models, etc. PDP course brokers need is how to support their staff in their education, education about the programs and education available. Tools that are available for REALTORS[®]. Lots of stuff out there, need for more education about what's out there. BCREA course for brokers so they can support their staff.
- There's enough new stuff in the courses, especially *Legally Speaking*, to make it worthwhile attending. Expanding the credit model to include outside speaking, seminars, etc. would be good.

- additional courses, such as mastering Lone Wolf (computer program)
- Maybe managing broker license needs more time. Taking the course not enough, need more experience. If you've been a broker managing 2 people, you won't know much, but if lots of transactions, and have lots of experience. The urban land economics program, 4 year diploma program, maybe more in-depth and required education would be good. UBC diploma program land economics.
- Nothing that I need at my stage. I know where to find information.
- What gives the broker a right to be a broker aside from an academic course? Need a course in just how to handle staff, how to train staff, why to train staff. And how to handle an office financially, usually brokers go by the seat of their pants, been like that for years, and years.
- Course needed re: liability around what we do and changing face of that. Will be important to keep well up on. Cost is the biggest thing.
- Good understanding of banks, financial – business side for managing brokers – day to day stuff. Handling the banks – interaction with banks – integral to deal. Current and changing banking legislation. Mainly residential. CHMC – have that fed in on regular basis so no surprises.
- *Legal Updates* are most important; changes in contract forms, pretty relevant. Relatively happy with most courses, some a waste.
- Should have to take some. Amount just about okay for compulsory. Want face-to-face but may not work here to bring a group of brokers together but would be interested – not web.
- Back to specialized topics. If you were to hold a course locally– like brokers' day. Hard to know what success they will have. That kind of training would be good. Would be nice to have some training on forms – webinars would be great. Taken a lot of brand training when tied into convention. But to go Vancouver for a course is too long. *Legal Update* for brokers as a preview.
- Separate us out. Higher level and more intensive – teaching side – how important different things are. Adhere to high level. Discussion model. Higher version of same ideas. Some of the motivation stuff should be options for brokers. Helpful to know how people are motivated: money, life style, recognition – how to motivate people in community involvement and promotion – brokers might find useful. In real estate, so much around public perception – where brokers need to shine. How do you motivate your people to get back to people; example setting; are you volunteering; effectively advertising. Broker specific legal update. Interesting – but hard to get any synchronous time. Would find challenging but like idea. Moderator could different set of question for the brokers – things that come up are government mandated and you need to be clear. An avenue for clarity for that. Phone in or in-person. Let's go over things that changed, communicate with brokers on issues.
- Anything for brokers
 - good idea to take *Legal Update* from broker perspective
 - business skills – must be business minded
- Would love a booklet for managing brokers on how to run educational side of sales meetings. 15 minute education topic for each meeting. Could be a video but doesn't have to be. Bullets are fine and even a list of topics and quick resources for broker to lead.
- PDP is geared to REALTORS®; little for brokers. Hard here because we only have three brokers. Brand conference is good for brokers. Expensive to get to and geared for big brokerages.
- All PDP for brokers is expensive when it involves travel and ferry is very unpredictable here. Does a lot of personal online training on HR issues for her own skills and benefit: HR, conflict management, job performance. Uses a program called Career Link. BCREA could support or accredit such courses. Would be good for managing brokers to get credit for this but BCREA doesn't need to develop the training - lots out there.

- BCREA could provide specific training on trust accounts, property management (loose cannon). Thankful to be part of a larger organization to connect/seek advice from other brokers. Meet once a month as a group.
- Business side of running a brokerage. Succession planning. Making difficult human resource decisions. Intensive managing broker course.
- Get rid of managing brokers. Not sure what they are there for. People going virtual, not having offices, just paying broker for copying. Role of broker has to be changed.
- Managing brokers need to familiar with their own jurisdiction and need to learn more about ethics.
- Particularly when you first become a Managing Broker, have courses on managing an office, what you have to do, talk to your REALTORS[®] about splits, and make sure your office is profitable.
- Small business management course. There is no training; it's all by trial and error.
- Managing brokers are more constructive and sharing than REALTORS[®]. We should have more round-table discussions to explore the current trends inside real estate. So we could have better ways to express our concerns.
- Topics: Advanced concepts:
 - Things that are constantly changing in the industry. Example: dealing with municipalities.
 - Mentorship programs – how to be a mentor or set up a mentorship program
 - Valuable program for PDP would be “Technology Update” annually. An annual meeting of the minds. Example: Avoiding the pitfalls of digital contracts.
 - Networking with other brokerages, sharing of legal information.

Business is competitive, but need to include camaraderie and collegiality, like other professions.
- Not sure. Think there are a lot of MBs out there who just collect the money and walk away. Find that they believe PDP is all that is needed, don't have much more to do with education. Improvement – they need to be educated themselves on how important it is to be educated.
- Could get together with other brokers around the province. Annually or every 2 years. Bring in motivational speakers. Don't know how that would be facilitated or by whom.
- Where does the broker learn how to be a broker other than trial and error and mistakes. Other brokers are competitors, so not very helpful. Some very basic procedures are in RESA. I would love to see a course on how to be a broker, what to focus on, have more experienced brokers open up, maybe discussion groups, course just for brokers. What are common mistakes, what do you check, what do you look for? Different business models.
- If you actually had one that was relevant that would be a good start. Please don't make it about recruiting salespeople from other people's offices, make it pertinent and relevant.
- Don't think I've ever seen a course on how to run a brokerage, for brokers. Managing offices for 23 years. How do you learn? Jump in the deep end, and some reading. Need a course with value to brokers. A lot of it is self-taught.
- Running brokerages 101 would be too low, make it a course on how to use technology perhaps, etc.
- Succession planning – I would have to bring someone up and teach them. Attended lots of seminars. Share ideas with other brokers.
- Brokers without much training, how do you motivate people who are not actually your employees? Realistically, getting more skills as a manager would be beneficial to our REALTORS[®].
Topics: Psychology of sales, reading people, dealing with difficult people, diffusing situations, etc. Small brokerages, things like accounting, etc.
- Don't see any courses that are there for managing brokers. Things like keeping updated with commercial side to some degree. Where to go for the answers – what's out there, where to look. What happens when there is a complaint to council? How do you find out what to do? Processes etc.

- Like doing it, enjoy it. Public speaking cool opportunity to talk to those who are interested in being better. Show others ways to get better at what they do. Jury still out on the BCREA course. Not liking teaching online. Not convinced that this kind of business education should be online; it is primarily a people business. If you can't communicate and interact with people, how will you ever become a great agent?
- They ask, and it is needed.
- enjoy it
- I do it because I never had the opportunity to have someone help me get educated, so I'm helping others get educated.
- Loves teaching and likes to be interactive with REALTORS[®]. Analogy: a brokerage is like a hockey team. Competitive against each other but still needs the team to win.
- Would love to be a trainer in real estate.
- Fun. Community involvement, networking opportunities.
- To develop ourselves. Also possible way to be good for recruiting. If we can show others how to build their business, then they'll think they should work here.
- Feels satisfied in watching people get it; help people move along; meet lots of people; engaged in profession; important – hard when people are too busy-give back.

Why Not

- have full plate now
- don't feel qualified
- too far, too much going on
- Problem is board picks instructors and doesn't see eye-to-eye with board.
- Did do training when a part of brand but felt it was self-serving and didn't protect the public.
- Other brokerages see it as competition and have asked me not to do training.

he went independent. Got away from unethical side of business. Still sees a lot of unethical practices (like inflating rental values) that get swept under carpet and council doesn't address. Greatest issue is ethical standards. Huge commissions are a real draw for people to compromise ethical standards – if you need money to pay your mortgage you might stretch your ethics to make a deal happen. I think real estate business is so critical to people's lives, would like to see people who do that work held to a higher standard than they are. Aiming for minimum. If training had testing, would weed out REALTORS® that don't care. Naturally elevate standards.

- Lawmakers have made poor changes: you can now run an office in a different geographical location, 200 REALTORS® and part-time management. REALTORS® selling outside of geographical area are making big mistakes because they don't know the issues.
- Open up credits. Any education is worth something. Have harsher penalties for brokerages that don't support their REALTORS®.
- How to recognize formal vs. informal training - sometimes informal is more effective.
- Too many boards in BC. All have different rules/forms. We should have fewer boards.
- Some courses are awesome. BCREA could audit. Some like online course better than PDP.
- Most REALTORS® don't know what BCREA does – should be more explicit with their value. They need to communicate more with their agents/members or at least with managers. Make sure they know what BCREA is doing. REALTORS® know Real Estate Board and Council (licensing), E & O. When it comes to CREA and BCREA. Don't know. You hear issues about business bureau or this and that; hear things at board meetings and don't know what is going on. Boards don't know what is going on.
- Main role of BCREA should be education. Definitely REALTORS® need to be trained. When they get into business for a while, they hire an accountant. Better to know at beginning what to do. Planning is everything. Managing their finances. You may not be able to sell for six months.
- Training is a huge issue in real estate. If REALTORS® are well educated and implement that education, they can be successful. Currently they are not trained well. Companies –there are huge numbers with no training. Some with minimal fees – run into trouble with new REALTORS® mainly; experienced REALTORS® are okay. One office started last year with 6 REALTORS®; now 73 REALTORS® – they just pay a 1-time fee. They have no office. When you make a sale, pay a deal fee. Fees here a little higher but get service.
- Because of our business model we wouldn't be in favour of BCREA getting into soft skills. We are full service and compete with companies that charge low monthly desk fees. We couldn't compete if BCREA got into soft skills. There are lots of courses that REALTORS® can take courses privately to build those skills. Recognize we might be holding onto a dinosaur.
- We must start bringing in young REALTORS® if we are going to survive. We have good new recruits, none over 30. All are successful, bonded and motivate each other. They make each other better. We are a profit share company. Before REALTORS® were information providers; now there is a shift – don't give information but provide service of value. So many issues, things have to be done properly.
- Industry is complicating itself: so many clauses are complicated, so training is self-serving and not good for industry.
- Don't want education to be a barrier; look at demographics that make up real estate. How do you deliver mandatory education vs. designations that maintain their integrity? Push back from big companies and council around barriers to entry. They are not interested in raising the bar.
- Have a fractured education system, too many boards. Needs to be more cohesive; less costly, less repetition.
- Our business model became broken 20 years ago. It's a bodies-for-a-fee model – driven by large number of people at a low cost and delivery of a minimum set of services. 20 years ago it was a different kind of

business model; full service real estate companies whether a name brand or independent – that brought people in and trained and shared in the commission. Ownership took a position in the business to make them successful. Brokerages were in the real estate business/now they are the in REALTOR® business. I'm here to provide goods and services to the REALTOR® population and they provide service to client. When I was with a national brand we would go out in the field with new recruits. That doesn't exist anymore; REALTORS® see money; I'll get training with split-fee company and then go to other business, cheaper business model once I'm trained. Hard for brokerage to stay in business with that kind of model.

- Have gone and sought education wherever I could find it, how to be a better REALTOR®. All I got in return was negativity from my peers. It's the only industry that requires the cooperation and sharing of information, first industry to cut you off at the knees (peers). BCREA has to define its role. Too many boards. All on different systems, don't share information properly.
- Demographics play a big role; younger people are more engaged. Quite content with what's being offered. Consensus among the older REALTORS® in the office. Online courses with no live instructors are not good. Younger people find online OK.
- I am unsatisfied with some of the training by other Brokers throughout the province on basic contractual matters. For example:
 - The time I have wasted on making other broker's salespeople comply with using an amendment form with correct wording instead of an addendum form to change contracts already made.
 - Using the proper special title clause when a title search contains an easement or statutory building scheme
 - Making the seller declare residency on CPS.
 - Generally drafting enforceable contracts. Many salespeople act as if their brokerage simply does not do, or care to do, those things.
- Has 35 years experience in real estate. Has always been very involved in education, used to have to get his education on his own. Has owned an office, managed a large office, and taught both pre-licensing and post-licensing courses. Main issue with the industry is that we don't pre-qualify our new people. Would have higher standard of people entering the profession, wouldn't have the extremely high "exit rate" that we do. We need aptitude and skills tests. When I managed a 44-person office, you enticed people to come from other brokerages, or you brought in new recruits. For new recruits, we set up a pre-licensing training program. Interviewed about 20 people, administered aptitude tests, and selected 6 of those 20 to be trained, and of those 6 of 20 who made it into industry, they're still here 30 years later.
- I get concerned about BCREA taking on too much responsibility of education, rather than have the education be the broker's responsibility. It's the broker's responsibility to get their REALTORS® educated. Got to make sure the broker is the person responsible.
- Brokers association? Seems to be a Vancouver thing.
- BCREA has to be careful that we get education out to the outlying areas, where there isn't the technology or the face-to-face course.
- Can't deny usefulness of education – can't quantify what someone will take out of it. Just raises the standard in this business.
- Competitive – don't mind being under the radar; the more the better; wherever it comes from.
- Would prefer to take managing broker course face-to-face, not online – hard to do on top of everything.
- New REALTORS® – need to know they are in a business and how to run it
- Some general salesmanship education – psychology of sales would be useful.
- PDP course in sales skills: non-specific to a certain method; not putting an emphasis on brand.

- Look at industry and where it's heading – small offices going away due to economies of scale. Demands larger models. Loss of control. Little incentive to be a broker. Little financial incentive and margins aren't there. Fee issues. Cheaper with larger brokerages.
- In a small community, as a broker I wonder who is going to fill my shoes? Two offices in this town compared to 5 before. Baby boomers – look at demographics – who is taking over?
- New business models taking over, smaller brokerages will be going, people will work at home in a small town but be connected to larger brokerages in urban centres. Less control when everything is from a distance.
- Education comes with stigma: REALTORS® view it as a negative. Wants to get beyond that notion. Can see when reading contracts that people need education; they understand they are running a business; how to get them to see the value. Percentage that come to it grudgingly; some look forward to it. Quality of speaker can make it different. Good instructor then good.
- BCREA doing what they can as far as board: any changes to legal should go brokers. *Legally Speaking* is
- Long history of office attendance at seminars even prior to mandatory PDP. Part of culture here.
- CREA's advertising is a problem. There is a fear of who will come from the outside into the business: Costco, banks. Will hit Vancouver first.
- Real estate going wrong way. Less human contact; hard to trust word.
- Don't think you should get your license and just be tossed out onto the street. You should be working with someone, shadowing, in a mentorship format. Shouldn't get license until they get the RTSAP course.
- Time for the boards to suck it up, figure it out, we don't need 11 boards in BC, only need 1 or 2 boards; a lot of that money could be going to education. How many people do you need to enforce regulations. Would like to remove layers, get rid of all but 1-2 boards.
- I don't think they should amalgamate the boards – different jurisdictions with different requirements.
- You want education to be conforming, the same for all.
- BCREA should expand courses into more detail than just *Legal Update*.
- Need some consistency across the board for education from BCREA.
- Would like for them to have new and refresher training for new and experienced managing brokers. Sometimes things come up and change, but they don't do any training to let us know what's coming up. E.g., Older mobile homes and electrical inspections; selling on First Nations land. There is nothing to tell us exactly what we need to do and why.
- We are professionals, but don't have internships or adjudication of new REALTORS®. No screening. Need more controlled concept of training/assessment in the industry to be professionals.
- Have tried to use internet for training, e.g., CREA online course. Some of our REALTORS® have taken online courses to pick up enough credits for re-licensing. Am going to take a couple of courses online to see what they are all about. Good connectivity up there.
- Generally, it is important to bring in new REALTORS® occasionally to keep things moving. Also, important for managing brokers to keep selling, or they become irrelevant
- I teach the real estate course to new REALTORS®, would so much wish they would rewrite the course, and interview brokers about what the new recruits need to know. Break it down into relevant topics, what you can do, what you can't. Creates a negative state, by giving new REALTORS® legal instruction that isn't concise and clear. Setting the up for a liability. Have run into this a few times.
- Organized real estate in general is trying to perfect the system and just because a problem comes up doesn't mean a new procedure and new form has to be created. The board tries to regulate us to death. We are never going to solve all the problems but industry is doing a very good job. Licensing course is not good, but after licensing training is great, fantastic teachers, great material.

- Always on call. You want REALTORS® to ask before they make a mistake. Need to teach them where to get information.
- Need training in ethics, honesty, courtesy, and communications. Need to have dynamic and interesting instructors.
- When people want to get into real estate, we talk to them about things they need to know to get involved, how much it costs to get licensed, how much to be in the business for the next 6 months. Seeing someone fail because they run out of money is tough. Needs to be more explanation about what it really takes to get going.
- If you are going to be licensed, you have to be active in the business, too many people “sort of” doing it here and there. It becomes a hobby not a profession. As the industry has changed and is changing, we have to show that we have a skill set that the public needs, adds value. Hard to keep that skill set up if you aren’t doing it full time. What do we bring to the transaction? When we don’t look professional, we don’t seem to be needed as much, hurts the industry.

Appendix 3: Filter Reports

1. Data Filtered by Question

Soft skills Training

- 54% of independently branded brokers agreed that BCREA should provide soft skill training whereas 40% of brokerages associated with a brand agreed.
- 53% of split commission and 50% of combination fee and commission business models agreed that BCREA should provide soft skill training whereas 34% of fee-based business models agreed.
- 52% of owner brokers/managing brokers agreed that BCREA should provide soft skill training whereas 41% of managing brokers agreed.
- 50% of selling managers that agreed that BCREA should provide soft skill training whereas 39% of non-selling managers agreed.
- 65% brokerages with 26-60 REALTORS[®] agreed that BCREA should provide soft skill training whereas 47% of brokerages of 1-25 and 25% of 51-100 REALTORS[®] agreed.
- 67% of brokers from VIREB and 50% of brokers from OMREB agreed that BCREA should provide soft skills training whereas 27% from FVREB and 32% from REBGV agreed.
- 51% of brokers in a mix of urban and rural service areas agreed that BCREA should provide soft skills training whereas 38% of brokers in an urban/city service area agreed.

Topics Related to Business Management

- 57% of split commission and 56% of combination fee and commission business models agreed that BCREA should provide training on topics related to business management whereas 42% of fee-based business models agreed.
- 70% brokerages with 26-60 REALTORS[®] agreed that BCREA should provide training on topics related to business management whereas 54% of brokerages with 1-10, 58% of 11-25, and 25% of 51-100 REALTORS[®] agreed.
- 68% of brokers from VIREB and 54% of brokers from OMREB agreed that BCREA should provide training on business management skills whereas 42% from FVREB and 41% from REBGV agreed.

Basic Customer Service

- 58% of independently branded brokers agreed that BCREA should provide basic customer service training whereas 48% of brokerages associated with a brand agreed.
- 59% of split commission and 50% of combination fee and commission business models agreed that BCREA should provide basic customer service training whereas 40% of fee-based business models agreed.
- 37% of brokerages with 51-100 REALTORS[®] agreed that BCREA should provide training on topics related to basic customer services skills whereas 50% of brokerages with 26-50, 55% of 1-10, and 57% of 11-25% of REALTORS[®] agreed.
- 55% of brokers from VIREB and 54% of brokers from OMREB agreed that BCREA should provide training on basic customer service skills whereas 33% from FVREB and 39% from REBGV agreed.

All Competencies

- 72% of split commission and 70% of combination fee and commission business models agreed that BCREA should provide training on all competencies whereas 59% of fee-based business models agreed.
- 71% of selling managers models agreed that BCREA should provide training on all competencies whereas 58% of non-selling managers agreed.

- 60% of brokerages with 51-100 REALTORS[®] agreed that BCREA should provide training on all competency areas whereas 72% of brokerages with 1-10 and 74% of brokerages with 11-50 REALTORS[®] agreed.
- 52% of brokers from FVREB, 62% of brokers from REBGV, 67% of brokers from VIREB and 84% of brokers from OMREB agreed that BCREA should provide training on all competency areas.

Education Is an Important Recruitment Tool

- 65% of brokers associated with a brand agreed that education is an important recruitment tool for their brokerage whereas 42% of independently branded brokers agreed.
- 62% of non-selling managers agreed that education is an important recruitment tool for their brokerage whereas 41% of selling managers agreed.
- 65% of brokerages with 26-50, 67% of brokerages with 11-25, REALTORS[®] and 70% of brokerages with 51-100 REALTORS[®] agreed that education is an important recruitment tool for their brokerage whereas 37% of brokerages with 1-10 REALTORS agreed.
- 50% of brokers from OMREB, 56% of brokers from REBGV, 63% of brokers from FVREB, and 65% of brokers from VIREB and agreed that education is an important recruitment tool.
- 67% of brokers who provide either formal or informal training agreed that education is an important recruitment tool whereas only 17% of those who do not provide formal or informal training agreed.

In-House Accreditation

- 60% of brokers associated with a brand agreed that there should be a mechanism for to have some of their in-house training accredited whereas 35% of independently branded brokers agreed.
- 57% of combination fee and commission business models agreed that there should be a mechanism for to have some of their in-house training accredited whereas 49% of split commission and 40% of fee-based business models agreed.
- 55% of non-selling managers agreed that there should be a mechanism for to have some of their in-house training accredited whereas 45% of selling managers agreed.
- 70% of brokerages with 51-100 REALTORS[®] agreed that BCREA should provide a mechanism for brokerages to have some of their in-house training accredited whereas 37% of brokerages with 1-10, 61% of 11-25 and 40% of brokerages with 26-50 REALTORS[®] agreed.
- 53% of brokers from FVREB and 65% of brokers from VIREB agreed that BCREA should provide a mechanism to have their in-house training accredited whereas 42% of brokers from OMREB and 49% of brokers from REBGV agreed.
- 58% of brokers who provide either formal or informal training agreed that there should be a mechanism for brokers to have some of their in-house training accredited whereas only 20% of those who do not provide formal or informal training agreed.

2. Data Filtered by Trends

Summary Report: Aggregate Data

- Selling 125 vs. Non-selling 71
- Associated with a brand 112 vs. Independently branded 90
- Managing Brokers 103 vs. Managing Broker and Broker Owner 83

The following represents the number of survey respondents with filters applied.

Number of REALTORS® in Brokerage: 1-10*

Selling Manager + Managing/Broker Owner + Independently Branded: 24

Selling Manager + Managing/Broker Owner + Brand: 18

Selling Manager + Managing Broker + Independently Branded: 16

Selling Manager + Managing Broker + Brand: 12

Non-Selling Manager + Managing Broker + Independently Branded: 4

Non-Selling Manager + Managing/Broker Owner + Independently Branded: 4

Non-Selling Manager + Managing Broker + Brand: 3

Non-Selling Manager + Managing/Broker Owner + Brand: 1

*Note: The owner broker only category was excluded from filter due to lack of data. Only 10 broker owners who are not also managing brokers responded to the survey.

Trends

- More selling managers (70) participated than non-selling (12)
- More brokerages that are independently branded (48) than associated with a brand participated (34)
- More managing/broker owners (47) participated than solely managing brokers (35)

Number of REALTORS® in Brokerage: 11-50*

Non-Selling Manager + Managing Broker + Brand: 10

Selling Manager + Managing Broker + Brand: 10

Selling Manager + Managing/Broker Owner + Brand: 7

Non-Selling Manager + Managing/Broker Owner + Brand: 7

Selling Manager + Managing Broker + Independently Branded: 6

Selling Manager + Managing/Broker Owner + Independently Branded: 6

Non-Selling Manager + Managing Broker + Independently Branded: 4

Non-Selling Manager + Managing/Broker Owner + Independently Branded: No data

Trends

- More selling managers (29) participated than non-selling (21)
- More brokerages associated with a brand participated (34) than independently branded (16)
- More solely managing brokers (30) participated than managing/brokers owner (20)

*Note: The broker owner only category was excluded from filter due to lack of data. Only 10 broker owners who are not also managing brokers responded to the survey.

Number of REALTORS® in Brokerage: 51- More than 500*

Non-Selling Manager + Managing Broker + Brand: 15

Selling Manager + Managing Broker + Brand: 10

Non-Selling Manager + Managing Broker + Independently Branded: 9

Non-Selling Manager + Managing/Broker Owner+ Brand: 8

Non-Selling Manager + Managing/Broker Owner + Independently Branded: 2

Selling Manager + Managing Broker + Independently Branded: 2

Selling Manager + Managing/Owner Broker + Brand: 1

Selling Manager + Managing/Broker Owner + Independently Branded: No data

Trends

- More non-selling managers (34) participated than selling (13)
- More brokerages associated with a brand participated (34) than independently branded (13)
- More solely managing brokers (36) participated than managing/broker owners (11)

Conclusions

- More selling managers in small/medium brokerages than large
- More independently branded brokerages at the small level and more associated with brands at the medium and large levels
- More managing/broker owners at small and then medium and large brokerages, which have more solely managing brokers

3. Data Filtered by Competency Area

Note: number of respondents listed by filter type but likert scale represents percentage of those respondents.

Soft Skills Training

	SA/A	Neither	D/SD
Unfiltered Aggregate	47	30	23
Brokerage 1-10			
Selling Manager + Managing/Broker Owner + Independently Branded: 21	55	33	10
Selling Manager + Managing/Broker Owner + Brand: 18	50	33	17
Selling Manager + Managing Broker + Independently Branded: 14	50	42	7
Brokerage 11-50			
Non-Selling Manager + Managing Broker + Brand: 10	30	50	20
Selling Manager + Managing Broker + Brand: 9	50	38	12
Selling Manager + Managing/Broker Owner + Brand: 7	43	14	43
Brokerage 51-More than 500			
Non-Selling Manager + Managing Broker + Brand: 15	21	36	43
Selling Manager + Managing Broker + Brand: 10	30	40	30
Non-Selling Manager + Managing Broker + Independently Branded: 8	62	12	24

Trends

- Respondents from smaller brokerages agree more strongly that BCREA should offer training related to soft skills than respondents from larger brokerages (regardless of whether or not the respondent is associated with a brand and a managing broker/broker owner).
- Respondents from large brokerages who are independently branded agree more strongly that BCREA should offer training related to soft skills than those associated with a brand.

Topics Related to Business Management

	SA/A	Neither	D/SD
Unfiltered Aggregate	53	26	22
Brokerage 1-10			
Selling Manager + Managing/Broker Owner + Independently Branded: 21	62	29	10
Selling Manager + Managing/Broker Owner + Brand: 18	39	50	11
Selling Manager + Managing Broker + Independently Branded: 14	50	14	36
Brokerage 11-50			
Non-Selling Manager + Managing Broker + Brand: 10	70	30	0
Selling Manager + Managing Broker + Brand: 9	67	22	11
Selling Manager + Managing/Broker Owner + Brand: 7	43	29	28
Brokerage 51-More than 500			
Non-Selling Manager + Managing Broker + Brand: 15	33	33	33
Selling Manager + Managing Broker + Brand: 10	50	20	30
Non-Selling Manager + Managing Broker + Independently Branded: 8	38	50	12

Trends

- Respondents from small brokerages that are independently branded agree more strongly that BCREA should offer training on topic related to business management than smaller brokerages that are associated with a brand.

Basic Customer Service

	SA/A	Neither	D/SD
Unfiltered Aggregate	50	31	19
Brokerage 1-10			
Selling Manager + Managing/Broker Owner + Independently Branded: 21	71	19	10
Selling Manager + Managing/Broker Owner + Brand: 18	39	50	11
Selling Manager + Managing Broker + Independently Branded: 14	50	21	28
Brokerage 11-50			
Non-Selling Manager + Managing Broker + Brand: 10	50	30	20
Selling Manager + Managing Broker + Brand: 9	67	11	22
Selling Manager + Managing/Broker Owner+ Brand: 7	33	33	34
Brokerage 51-More than 500			
Non-Selling Manager + Managing Broker + Brand: 15	34	33	34
Selling Manager + Managing Broker + Brand: 10	40	40	20
Non-Selling Manager + Managing Broker + Independently Branded: 8	50	12	37

Trends

- Respondents from small brokerages that are independently branded agree more strongly that BCREA should offer training on basic customer service as it relates to the REALTOR® brand than smaller brokerages that are associated with a brand.
- Respondents who are non-selling managing brokers from large independently branded brokerages agree more strongly that BCREA should offer training on basic customer service as it relates to the REALTOR® brand than non-selling managing brokers from large brokerages associated with a brand.

All Competency Areas

	SA/A	Neither	D/SD
Unfiltered Aggregate	67	22	11
Brokerage 1-10			
Selling Manager + Managing/Broker Owner + Independently Branded: 21	72	19	10
Selling Manager + Managing/Broker Owner + Brand: 18	67	22	11
Selling Manager + Managing Broker + Independently Branded: 14	78	14	7
Brokerage 11-50			
Non-Selling Manager + Managing Broker + Brand: 10	77	11	11
Selling Manager + Managing Broker + Brand: 9	78	22	0
Selling Manager + Managing/Broker Owner + Brand: 7	43	14	43
Brokerage 51-More than 500			
Non-Selling Manager + Managing Broker + Brand: 15	40	40	20
Selling Manager + Managing Broker + Brand: 10	70	30	0
Non-Selling Manager + Managing Broker + Independently Branded: 8	75	0	25

Trends

- Respondents who are non-selling managing brokers from large independently branded brokerages agree more strongly that BCREA should offer training on all competency areas than non-selling managing brokers from large brokerages associated with a brand.

Recruitment

	SA/A	Neither	D/SD
Unfiltered Aggregate	55	30	15
Brokerage 1-10			
Selling Manager + Managing/Broker Owner + Independently Branded: 21	40	45	15
Selling Manager + Managing/Broker Owner + Brand: 18	55	22	22
Selling Manager + Managing Broker + Independently Branded: 14	21	50	28
Brokerage 11-50			
Non-Selling Manager + Managing Broker + Brand: 10	50	40	10
Selling Manager + Managing Broker + Brand: 9	67	22	11
Selling Manager + Managing/Broke Owner + Brand: 7	86	14	0
Brokerage 51-More than 500			
Non-Selling Manager + Managing Broker + Brand: 15	73	7	20
Selling Manager + Managing Broker + Brand: 10	80	0	20
Non-Selling Manager + Managing Broker + Independently Branded: 8	63	38	0

Trends

- Respondents from brokerages associated with a brand agree more strongly that education is an important recruitment tool than brokerages that are independently branded, regardless of brokerage size.

Accreditation

	SA/A	Neither	D/SD
Unfiltered Aggregate	49	33	18
Brokerage 1-10			
Selling Manager + Managing/Broker Owner + Independently Branded: 21	29	38	34
Selling Manager + Managing/Broker Owner + Brand: 18	61	22	17
Selling Manager + Managing Broker + Independently Branded: 14	36	43	21
Brokerage 11-50			
Non-Selling Manager + Managing Broker + Brand: 10	40	30	30
Selling Manager + Managing Broker + Brand: 9	55	33	11
Selling Manager + Managing/Broker Owner + Brand: 7	71	29	0
Brokerage 51-More than 500			
Non-Selling Manager + Managing Broker + Brand: 15	66	27	7
Selling Manager + Managing Broker + Brand: 10	70	10	20
Non-Selling Manager + Managing Broker + Independently Branded: 8	50	25	24

Trends

- Respondents from small and large brokerages associated with a brand agree more strongly that there should be a mechanism for brokerages to have some of their in-house training accredited than independently branded small and large brokerages.

4. Data Filtered by Brand/Business Model

Soft Skills Training

	SA/A	Neither	D/SD
Unfiltered: 186	47	30	23
Associated with a Brand: 103	40	32	29
Independently Branded: 82	54	28	18
Fee Based: 42	34	34	32
Split Commission: 70	53	27	20
Combo Fee/Commission: 65	50	27	23
Other: equal partners, all owners, single owner: 7	29	43	28

- 54% of independently branded brokers agreed that BCREA should provide soft skill training whereas 40% of branded agreed.
- 53% of split commission and 50% of combination fee and commission business models agreed that BCREA should provide soft skill training whereas 34% of fee-based business models agreed.

Topics Related to Business Management

	SA/A	Neither	D/SD
Unfiltered	53	26	22
Associated with a Brand	50	29	21
Independently Branded	54	22	25
Fee Based	42	19	40
Split Commission	57	30	13
Combo Fee/Commission	56	23	22
Other	28	57	14

- 57% of split commission and 56% of combination fee and commission business models agreed that BCREA should provide training on topics related to business management whereas 42% of fee-based business models agreed.

Basic Customer Service

	SA/A	Neither	D/SD
Unfiltered	50	31	19
Associated with a Brand	45	33	23
Independently Branded	58	27	15
Fee Based	40	28	33
Split Commission	59	33	9
Combo Fee/Commission	50	30	20
Other	28	43	28

- 58% of independently branded brokers agreed that BCREA should provide basic customer service training whereas 48% of branded agreed.

- 59% of split commission and 50% of combination fee and commission business models agreed that BCREA should provide basic customer service training whereas 40% of fee-based business models agreed.

All Competencies

	SA/A	Neither	D/SD
Unfiltered	67	22	11
Associated with a Brand	63	24	14
Independently Branded	72	20	9
Fee Based	59	24	17
Split Commission	72	26	2
Combo Fee/Commission	70	15	15
Other	43	29	29

- 72% of split commission and 70% of combination fee and commission business models agreed that BCREA should provide training on all competencies whereas 59% of fee-based business models agreed.

Education Is an Important Recruitment Tool

	SA/A	Neither	D/SD
Unfiltered	55	30	15
Associated with a Brand	65	20	15
Independently Branded	42	42	16
Fee Based	58	26	16
Split Commission	55	31	14
Combo Fee/Commission	57	31	13
Other	29	29	43

- 65% of brokers associated with a brand agreed that education is an important recruitment tool for their brokerage whereas 42% of independently branded brokers agreed.

In-House Accreditation

	SA/A	Neither	D/SD
Unfiltered	49	33	18
Associated with a Brand	60	27	13
Independently Branded	35	40	26
Fee Based	46	30	23
Split Commission	49	30	21
Combo Fee/Commission	57	35	9
Other:	0	57	43

- 60% of brokers associated with a brand agreed that there should be a mechanism for to have some of their in-house training accredited whereas 35% of independently branded brokers agreed.
- 57% of combination fee and commission business models agreed that there should be a mechanism for to have some of their in-house training accredited whereas 49% of split commission and 40% of fee-based business models agreed.

5. Data Filtered by Roles

Soft Skills Training

	SA/A	Neither	D/SD
Unfiltered: 186	47	30	23
Broker Owner: 10	60	20	20
Managing Broker: 96	41	33	25
Broker Owner and Managing Broker: 74	52	27	22
Other*: 5	40	40	20
Non-Selling Manager: 65	39	30	31
Selling Manager: 115	50	31	19

* "Other" category. Consists of managers and a manager not yet licensed.

- 52% of owner brokers/managing brokers agreed that BCREA should provide soft skill training whereas 41% of managing brokers agreed.
- 50% of selling managers that agreed that BCREA should provide soft skill training whereas 39% of non-selling managers agreed.

Topics Related to Business Management

	SA/A	Neither	D/SD
Unfiltered	53	26	22
Broker Owner	50	40	10
Managing Broker	53	23	24
BO & MB	51	28	20
Other	60	20	20
Non-Selling Manager	49	26	24
Selling Manager	54	26	20

Basic Customer Service

	SA/A	Neither	D/SD
Unfiltered	50	31	19
Broker Owner	50	50	0
Managing Broker	47	30	23
Broker Owner and Managing Broker	53	31	16
Other	80	20	0
Non-Selling Manager	50	25	24
Selling Manager	50	34	17

All Competencies

	SA/A	Neither	D/SD
Unfiltered	67	22	11
Broker Owner	70	30	0
Managing Broker	70	21	8
Broker Owner and Managing Broker	64	22	13
Other	60	20	20

Non-Selling Manager	58	27	16
Selling Manager	71	19	10

- 71% of selling managers models agreed that BCREA should provide training on all competencies whereas 58% of non-selling managers agreed.

Education Is an Important Recruitment Tool

	SA/A	Neither	D/SD
Unfiltered	55	30	15
Broker Owner: 10	50	30	20
Managing Broker: 97	54	30	15
Broker Owner and Managing Broker: 74	59	27	14
Other: 6	40	40	20
Non-Selling Manager: 65	62	28	9
Selling Manager: 116	51	31	18

- 62% of non-selling managers agreed that education is an important recruitment tool for their brokerage whereas 41% of selling managers agreed.

In-House Accreditation

	SA/A	Neither	D/SD
Unfiltered	49	33	18
Broker Owner	20	40	40
Managing Broker	50	32	18
Broker Owner and Managing Broker	53	32	15
Other	50	25	25
Non-Selling Manager	55	33	13
Selling Manager	45	33	22

- 55% of non-selling managers agreed that there should be a mechanism for to have some of their in-house training accredited whereas 45% of selling managers agreed.

6. Data Filtered by Number of REALTORS® in Brokerage

Soft Skills Training

	SA/A	Neither	D/SD
Unfiltered: 186	47	30	23
1-10: 88	47	32	20
11-25: 30	47	30	23
26-50: 20	65	25	10
51-100: 20	25	30	45
101-150: 15	33	27	40
151-200: 8	62	38	0
201-250: 4	66	0	33
251-300: No data			
301-400: No data			
401-500: No data			
More than 500 1			100

- 65% brokerages with 26-60 REALTORS® agreed that BCREA should provide soft skill training whereas 47% of brokerages of 1-25 and 25% of 51-100 REALTORS® agreed.

Topics Related to Business Management

	SA/A	Neither	D/SD
Unfiltered	53	26	22
1-10	54	31	16
11-25	58	19	22
26-50	70	20	10
51-100	25	30	45
101-150	40	20	40
151-200	63	25	12
201-250	75	0	25
251-300 No data			
301-400 No data			
401-500 No data			
More than 500	0	0	100

- 70% brokerages with 26-60 REALTORS® agreed that BCREA should provide training on topics related to business management whereas 54% of brokerages with 1-10, 58% of 11-25, and 25% of 51-100 REALTORS® agreed.

Basic Customer Service Skills

	SA/A	Neither	D/SD
Unfiltered	50	31	19
1-10	55	32	14
11-25	57	23	20

26-50	50	35	15
51-100	37	26	37
101-150	26	40	33
151-200	75	12	12
201-250	0	75	25
251-300 No data			
301-400 No data			
401-500 No data			
More than 500	100	0	0

- 37% of brokerages with 51-100 REALTORS® agreed that BCREA should provide training on topics related to basic customer services skills whereas 50% of brokerages with 26-50, 55% of 1-10, and 57% of 11-25% of REALTORS® agreed.

All Competency Areas

	SA/A	Neither	D/SD
Unfiltered	67	22	11
1-10	72	17	11
11-25	74	13	13
26-50	74	26	0
51-100	60	15	25
101-150	33	47	20
151-200	76	25	0
201-250	25	75	0
251-300 No data			
301-400 No data			
401-500 No data			
More than 500	0	100	0

- 60% of brokerages with 51-100 REALTORS® agreed that BCREA should provide training on all competency areas whereas 72% of brokerages with 1-10 and 74% of brokerages with 11-50 REALTORS® agreed.

Education Is an Important Recruitment Tool

	SA/A	Neither	D/SD
Unfiltered	55	30	15
1-10	37	43	21
11-25	67	19	12
26-50	65	30	5
51-100	70	15	15
101-150	80	13	7
151-200	74	12	12
201-250	75	25	0
251-300 No data			
301-400 No data			

401-500 No data			
More than 500	0	100	0

- 65% of brokerages with 26-50, 67% of brokerages with 11-25 REALTORS[®], and 70% of brokerages with 51-100 REALTORS[®] agreed that education is an important recruitment tool for their brokerage whereas 37% of brokerages with 1-10 REALTORS[®] agreed.

In-House Accreditation

	SA/A	Neither	D/SD
Unfiltered	49	33	18
1-10	37	38	25
11-25	61	29	10
26-50	40	40	20
51-100	70	20	10
101-150	53	33	14
151-200	88	12	0
201-250	50	25	25
251-300 No data			
301-400 No data			
401-500 No data			
More than 500	100	0	0

- 70% of brokerages with 51-100 REALTORS[®] agreed that BCREA should provide a mechanism for brokerages to have some of their in-house training accredited whereas 37% of brokerages with 1-10, 61% of 11-25 and 40% of brokerages with 26-50 REALTORS[®] agreed.

7. Data Filtered by Board Region

Soft Skills Training

	SA/A	Neither	D/SD
Unfiltered: 186	47	30	23
CADREB*: 5	60	20	20
FVREB: 20	27	21	53
KADREA*: 4	75	0	25
KREB 8*:	62	25	12
BCNREB: 13	38	38	23
OMREB: 26	50	31	20
PRSCREB*: 3	100	0	0
REBGV: 42	32	34	34
SOREB: 16	31	44	25
VIREB: 31	67	23	10
VREB: 19	52	37	11

*Limited number of respondents.

- 67% of brokers from VIREB and 50% of brokers from OMREB agreed that BCREA should provide soft skills training whereas 27% from FVREB and 32% from REBGV agreed.

Business Management Skills

	SA/A	Neither	D/SD
Unfiltered	53	26	22
CADREB	60	40	0
FVREB	42	0	58
KADREA	75	0	25
KREB	37	62	0
BCNREB	46	31	23
OMREB	54	27	19
PRSCREB	66	33	0
REBGV	41	29	31
SOREB	38	38	24
VIREB	68	19	13
VREB	74	26	0

- 68% of brokers from VIREB and 54% of brokers from OMREB agreed that BCREA should provide training on business management skills whereas 42% from FVREB and 41% from REBGV agreed.

Basic Customer Service Skills

	SA/A	Neither	D/SD
Unfiltered	50	31	19
CADREB	60	20	20
FVREB	33	28	39
KADREA	50	50	0
KREB	63	38	0
BCNREB	62	23	15
OMREB	54	31	16
PRSCREB	67	33	0
REBGV	39	29	32
SOREB	31	38	31
VIREB	55	39	6
VREB	74	21	5

- 55% of brokers from VIREB and 54% of brokers from OMREB agreed that BCREA should provide training on basic customer service skills whereas 33% from FVREB and 39% from REBGV agreed.

All Competencies

	SA/A	Neither	D/SD
Unfiltered	67	22	11
CADREB	75	25	0
FVREB	52	26	21
KADREA	100	0	0
KREB	87	12	0
BCNREB	77	15	8
OMREB	84	16	0
PRSCREB	67	33	0
REBGV	62	24	14
SOREB	44	19	38
VIREB	67	23	9
VREB	64	32	5

- 52% of brokers from FVREB, 62% of brokers from REBGV, 67% of brokers from VIREB and 84% of brokers from OMREB agreed that BCREA should provide training on all competency areas.

Education Is an Important Recruitment Tool

	SA/A	Neither	D/SD
Unfiltered	55	30	15
CADREB	60	20	20
FVREB	63	5	32
KADREA	75	25	0
KREB	63	25	12
BCNREB	30	46	23

OMREB	50	42	8
PRSCREB	100	0	0
REBGV	56	34	10
SOREB	31	38	31
VIREB	65	26	9
VREB	53	32	16

- 50% of brokers from OMREB, 56% of brokers from REBGV, 63% of brokers from FVREB, and 65% of brokers from VIREB and agreed that education is an important recruitment tool.

In-House Accreditation

	SA/A	Neither	D/SD
Unfiltered	49	33	18
CADREB	80	20	0
FVREB	53	32	16
KADREA	50	25	25
KREB	50	38	12
BCNREB	15	62	23
OMREB	42	38	19
PRSCREB	66	0	33
REBGV	49	22	29
SOREB	37	44	19
VIREB	65	26	10
VREB	48	42	11

- 53% of brokers from FVREB and 65% of brokers from VIREB agreed that BCREA should provide a mechanism to have their in-house training accredited whereas 42% of brokers from OMREB and 49% of brokers from REBGV agreed.

8. Data Filtered by Service Area

Soft Skills Training

	SA/A	Neither	D/SD
Unfiltered: 186	47	30	23
Urban/City: 56	38	33	29
Rural/Country: 19	47	26	26
Mix of urban and rural: 106	51	28	22
Other 5	60	40	0

Other = recreation and resort properties

- 51% of brokers in a mix of urban and rural service areas agreed that BCREA should provide soft skills training whereas 38% of brokers in an urban/city service area agreed.

Business Management Skills

	SA/A	Neither	D/SD
Unfiltered	53	26	22
Urban/City	46	27	27
Rural/Country	53	26	21
Mix of urban and rural	54	25	21
Other	100	0	0

Basic Customer Service

	SA/A	Neither	D/SD
Unfiltered	50	31	19
Urban/City	54	22	24
Rural/Country	47	37	16
Mix of urban and rural	48	34	18
Other	60	40	0

All Competency Areas

	SA/A	Neither	D/SD
Unfiltered	67	22	11
Urban/City	66	23	11
Rural/Country	56	33	12
Mix of urban and rural	70	19	12
Other	80	20	0

Education Is an Important Recruitment Tool

	SA/A	Neither	D/SD
Unfiltered	55	30	15
Urban/City	52	34	14
Rural/Country	47	32	22
Mix of urban and rural	60	26	15
Other	20	60	20

In-House Accreditation

	SA/A	Neither	D/SD
Unfiltered 186	49	33	18
Urban/City	53	22	25
Rural/Country	26	37	37
Mix of urban and rural	52	37	12
Other	20	60	20

9. Data Filtered by Providing Formal or Informal Training

Soft Skills

	SA/A	Neither	D/SD
Unfiltered: 186	47	30	23
Provide formal or informal training: 139	47	27	26
Do not provide formal or informal training: 47	45	38	18

Small Business Training

	SA/A	Neither	D/SD
Unfiltered	53	26	22
Provide formal or informal training	54	24	24
Do not provide formal or informal training	49	30	21

Customer Service Training

	SA/A	Neither	D/SD
Unfiltered	50	31	19
Provide formal or informal training	52	28	21
Do not provide formal or informal training	45	40	15

All Competency Areas

	SA/A	Neither	D/SD
Unfiltered	67	22	11
Provide formal or informal training	66	22	12
Do not provide formal or informal training	72	19	8

Education Is an Important Recruitment Tool

	SA/A	Neither	D/SD
Unfiltered	55	30	15
Provide formal or informal training	67	21	12
Do not provide formal or informal training	17	59	24

- 67% of brokers who provide either formal or informal training agreed that education is an important recruitment tool whereas only 17% of those who do not provide formal or informal training agreed.

In-House Accreditation

	SA/A	Neither	D/SD
Unfiltered	49	33	18
Provide formal or informal training	58	24	17
Do not provide formal or informal training	20	59	21

- 58% of brokers who provide either formal or informal training agreed that there should be a mechanism for brokers to have some of their in-house training accredited whereas only 20% of those who do not provide formal or informal training agreed.

Appendix 4: Summary Reports of the Online Survey

Summary Report: Aggregate Data

To which member board does your brokerage belong?

Response	Chart	Percentage	Count
Chilliwack and District Real Estate Board		3%	6
Fraser Valley Real Estate Board		10%	21
Real Estate Board of Greater Vancouver		23%	47
Kamloops and District Real Estate Association		2%	4
Kootenay Real Estate Board		4%	9
Northern BC Real Estate Board		6%	13
Okanagan Mainline Real Estate Board		13%	27
Powell River Sunshine Coast Real Estate Board		1%	3
South Okanagan Real Estate Board		8%	17
Vancouver Island Real Estate Board		18%	36
Victoria Real Estate Board		10%	20
Total Responses			203

Which statement best describes the area(s) in which your brokerage services operate?

Response	Chart	Percentage	Count
Primarily urban/city		31%	62
Primarily rural/country		11%	22
A mix of both urban/city and rural/country		56%	114
Other:		2%	5
Total Responses			203

Which statement best describes your brokerage branding?

Response	Chart	Percentage	Count
Independently branded		44%	90
Associated with a brand		55%	112
Other:		1%	2
Total Responses			204

Which role best describes you?

Response	Chart	Percentage	Count
Managing Broker		51%	103
Broker Owner		5%	10
Managing Broker and Broker Owner		41%	83
Other:		3%	7
Total Responses			203

Which of the following describes your managing role?

Response	Chart	Percentage	Count
Selling manager		62%	125
Non-selling manager		35%	71
Other:		2%	5
Total Responses			201

Approximately how many REALTORS® are working in your brokerage?

Response	Chart	Percentage	Count
1-10		48%	98
11-25		17%	34
26-50		10%	21
51-100		11%	23
101-150		7%	15
151-200		4%	8
201-250		2%	4

More than 500	0%	1
Total Responses		204

On a day-to-day basis, how many active Managing Brokers does your brokerage have?

Response	Chart	Percentage	Count
1		78%	158
2		16%	33
3		1%	2
4 or more		5%	10
Total Responses			203

How many offices do you manage?

Response	Chart	Percentage	Count
1		72%	146
2		16%	32
3		6%	13
4		6%	13
Total Responses			204

Which statement best describes the business model in your brokerage?

Response	Chart	Percentage	Count
Fee-based		22%	45
Commission splitting		37%	76
Combination of fee and commission		36%	74
Other:		4%	8
Total Responses			203

Approximately how many ends (lists or sales) did your brokerage complete in 2012?

Response	Chart	Percentage	Count
1-1000		80%	158
1001-2000		14%	27
2001-3000		5%	9

3001-4000	1%	2
4001-5000	0%	0
More than 5000	1%	1
Total Responses		197

Please provide more detail on the number of ends (lists or sales) your brokerage completed in 2012.

Response	Chart	Percentage	Count
1-10		11%	17
11-50		20%	32
51-100		20%	32
101-200		16%	25
201-300		5%	8
301-500		16%	26
501-1000		11%	18
Total Responses			158

What is the average age of the REALTORS® in your brokerage?

Response	Chart	Percentage	Count
19-30		1%	3
31-40		14%	29
41-50		45%	91
51-60		33%	67
61+		6%	12
Total Responses			202

Please tell us your age group:

Response	Chart	Percentage	Count
19-30		2%	4
31-40		3%	6
41-50		15%	30
51-60		38%	76
61+		43%	86

Total Responses	202
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Does your brokerage provide either formal or informal education/training for your REALTORS®?

Response	Chart	Percentage	Count
Yes		75%	148
No		25%	50
Total Responses			198

Why does your brokerage not provide education/training for your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
You hire only experienced REALTORS®		34%	16
You lack financial resources for education/training.		13%	6
You lack in-house training facilities.		17%	8
You lack in-house training expertise.		13%	6
You rely on REALTORS® to manage their own training through PDP or other sources.		72%	34
Other:		21%	10
Total Responses			47

Where do you source your education/training for your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
In-house expertise		89%	130
Franchise courses		45%	66
BCREA/Board		67%	98
External vendors		48%	70
Other:		8%	12
Total Responses			146

To what types of education/training resources does your brokerage have access? Select all that apply.

Response	Chart	Percentage	Count
Training room/classroom		77%	113
Projector/SMART board		42%	61
Computer access for trainees		68%	100
Electronic resources (e.g., PowerPoint presentations, videos)		68%	99
i-clickers		3%	4
Paper resources (e.g., modules, handouts)		71%	103
Other:		11%	16
Total Responses			146

Who is the main audience for your brokerage education/training?

Response	Chart	Percentage	Count
New REALTORS®		11%	16
Experienced REALTORS®		8%	12
Both new and experienced REALTORS®		80%	114
Total Responses			142

Which teaching methods are employed by your brokerage for formal education/training? Select all that apply.

Response	Chart	Percentage	Count
Classroom lecture		49%	70
Classroom interactive (e.g., learner presentation/hands-on/role-play)		58%	83
Classroom video or webinar		50%	72
Classroom assignments or homework (e.g., completing a contract, disclosure form)		27%	39
Online, self-paced courses without an instructor		24%	35

Online, instructor-facilitated course		20%	29
N/A		9%	13
Other:		7%	10
Total Responses			144

What types of informal education/training does your brokerage offer? Select all that apply.

Response	Chart	Percentage	Count
Mentorship		73%	106
Scheduled staff/sales meetings		87%	127
Via social media (e.g., Facebook, blogs, websites, email)		34%	49
Newsletters		31%	45
Online question and answers (with experts)		8%	12
Informational dialogue with Managing Broker		88%	129
Online articles (e.g., RECBC website)		56%	82
N/A		1%	1
Other:		6%	9
Total Responses			146

Who provides the formal education/training in your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Managing Broker		85%	124
On-staff trainer		29%	43
External content experts		42%	62
External course vendors		30%	44
N/A		5%	8
Other:		4%	6
Total Responses			146

Who provides the informal education/training in your brokerage? Select all that apply.




Response	Chart	Percentage	Count
Managing Broker		95%	139
On-staff trainer		23%	34
Internal experts		35%	51
External experts		30%	44
N/A		1%	1
Other:		3%	5
Total Responses			146

What methods do you use to assess how much your REALTORS® have learned during formal education/training? Select all that apply.













Response	Chart	Percentage	Count
No formal assessment		44%	64
Satisfaction survey at end of session		10%	15
Quiz/test		3%	5
Monitor and assess performance during session		25%	36
Monitor and assess performance on-the-job after session		50%	72
Review contracts and transactions		65%	94
Other:		3%	4
Total Responses			145

What methods do you use to assess how much your REALTORS® have learned during informal education/training? Select all that apply.

Response	Chart	Percentage	Count
No assessment		38%	55
Satisfaction survey at end of session		9%	13
Quiz/test		3%	4
Monitor and assess performance during session		26%	37


Monitor and assess performance on-the-job after session		54%	78
Review contracts and transactions		65%	94
Other:		1%	2
Total Responses			145

What are the content areas for which you provide education/training to your REALTORS®? Select all that apply.



Response	Chart	Percentage	Count
Contract writing/standard clauses		94%	137
Legal Issues (i.e., agency, disclosure, Real Estate Services Act)		93%	135
Risk management		77%	112
REALTOR® Code, Code of Ethics		71%	103
Business (e.g., sales, marketing, lead generation)		76%	110
Financial management		31%	45
Communication skills		59%	86
Use of various technology devices (e.g., computer, tablet, Smartphone)		54%	79
Use of applications (e.g., REALTORLink®, WEBForms®, Web conferencing software, Skype)		58%	84
Use of digital and video cameras		14%	21
Use of social media (e.g., blogs, Facebook, YouTube, Twitter)		46%	66
Other:		3%	5
Total Responses			145

As a Managing Broker/Broker Owner, how are you available to answer questions from your REALTORS®? Select all that apply.



Response	Chart	Percentage	Count
Phone		98%	142

Email		97%	140
In person		98%	142
Other:		10%	15
Total Responses			145







Does your brokerage charge fees for its education/training services?

Response	Chart	Percentage	Count
Yes		8%	12
No		92%	133
Total Responses			145

Do you provide either formal or informal education/training to REALTORS® outside of your brokerage?


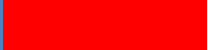






Response	Chart	Percentage	Count
Yes		17%	33
No		83%	161
Total Responses			194

In what contexts do you provide either formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Teaching in the Residential Trading Services Applied Practice Course		35%	11
Teaching in the BCREA Professional Development Program		26%	8
Teaching/speaking at a college/university		0%	0
Speaking/presenting at Board sponsored events		13%	4
Speaking/presenting at conferences		26%	8
On contract to other offices/companies		13%	4
Other:		32%	10

Total Responses	31
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For what purpose do you participate in formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
To enhance the professionalism of the industry		79%	26
To “give back” to the industry		61%	20
To enhance your own professionalism/business branding		64%	21
To expand your referral network		33%	11
For the remuneration		21%	7
To provide diversity to your Managing Broker role		30%	10
You enjoy teaching		61%	20
Other:		9%	3
Total Responses			33

Please state the degree to which you agree with the following statements:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Total Responses
Education plays an important role in elevating the status of the real estate profession.	139 (74%)	46 (24%)	2 (1%)	1 (1%)	0 (0%)	188
Organized real estate has a role to play in providing education to licensed REALTORS®.	118 (63%)	60 (32%)	6 (3%)	1 (1%)	1 (1%)	186
BCREA’s PDP should provide education on topics related to “hard skill” competencies, such as contracts,	136 (73%)	48 (26%)	3 (2%)	0 (0%)	0 (0%)	187


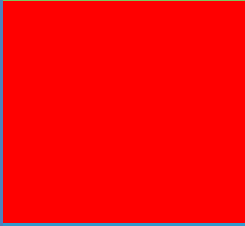





disclosure, agency, and the REALTOR® Code.						
BCREA’s PDP should provide education on topics related to secondary competencies, such as areas of specialization (e.g., strata, green building, and hazardous sites).	79 (43%)	81 (44%)	19 (10%)	5 (3%)	1 (1%)	185
BCREA’s PDP should provide education on topics related to “soft skill” competencies, such as prospecting, marketing, and sales.	44 (24%)	42 (23%)	55 (30%)	23 (12%)	21 (11%)	185
BCREA’s PDP should provide education on topics related to business management, such as running a small business and managing a budget.	39 (21%)	59 (32%)	48 (26%)	29 (16%)	12 (6%)	187
BCREA’s PDP should provide education on basic customer service as it relates to the REALTOR® brand.	39 (21%)	54 (29%)	57 (31%)	20 (11%)	15 (8%)	185
BCREA’s PDP should provide education across all competency areas in real estate education.	49 (26%)	75 (41%)	40 (22%)	12 (6%)	9 (5%)	185
REALTOR® education is an important recruitment tool	59 (32%)	43 (23%)	56 (30%)	18 (10%)	10 (5%)	186

for your brokerage.

There should be a mechanism for brokerages to have some of their in-house training accredited, according to established criteria, as part of the PDP program.

55 (30%)	36 (19%)	61 (33%)	24 (13%)	10 (5%)	186
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Please identify which of the following education opportunities would benefit you as a Managing Broker. Select all that apply.

Response	Chart	Percentage	Count
Discussions with other Managing Brokers, facilitated by a professional (for example, a lawyer) on issues related to contracts, agency, and disclosure.		79%	146
Discussions with other Managing Brokers, facilitated by a professional, on issues related to managing a brokerage, such as managing conflict and using of technology.		71%	131
A "Legal Update for Managing Brokers" course		84%	155
A "Managing Broker's Business Skills" course		58%	108
A "Succession-Planning for Managing Brokers" course		46%	85
A "Train-the-Trainer" course		44%	81
Other:		4%	8
Total Responses			185

Summary Report: Managing Broker

To which member board does your brokerage belong?


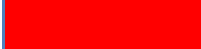
Response	Chart	Percentage	Count
Chilliwack and District Real Estate Board		3%	3
Fraser Valley Real Estate Board		12%	12
Real Estate Board of Greater Vancouver		28%	29
Kamloops and District Real Estate Association		1%	1
Kootenay Real Estate Board		4%	4
Northern BC Real Estate Board		7%	7
Okanagan Mainline Real Estate Board		12%	12
Powell River Sunshine Coast Real Estate Board		1%	1
South Okanagan Real Estate Board		6%	6
Vancouver Island Real Estate Board		17%	18
Victoria Real Estate Board		10%	10
Total Responses			103

Which statement best describes the area(s) in which your brokerage services operate?


Response	Chart	Percentage	Count
Primarily urban/city		35%	36
Primarily rural/country		10%	10
A mix of both urban/city and rural/country		53%	54
Other:		2%	2
Total Responses			102

Which statement best describes your brokerage branding?



Response	Chart	Percentage	Count
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Independently branded		40%	41
Associated with a brand		58%	60
Other:		2%	2
Total Responses			103








Which role best describes you?

Response	Chart	Percentage	Count
Managing Broker		100%	103
Broker Owner		0%	0
Managing Broker and Broker Owner		0%	0
Other:		0%	0
Total Responses			103




Which of the following describes your managing role?

Response	Chart	Percentage	Count
Selling manager		56%	58
Non-selling manager		44%	45
Other:		0%	0
Total Responses			103





Approximately how many REALTORS® are working in your brokerage?

Response	Chart	Percentage	Count
1-10		35%	36
11-25		14%	14
26-50		16%	16
51-100		17%	17
101-150		11%	11
151-200		7%	7
201-250		2%	2
Total Responses			103





On a day-to-day basis, how many active Managing Brokers does your brokerage have?

Response	Chart	Percentage	Count
1		70%	72
2		24%	25
3		0%	0
4 or more		6%	6
Total Responses			103





How many offices do you manage?

Response	Chart	Percentage	Count
1		63%	65
2		20%	21
3		6%	6
4		11%	11
Total Responses			103

Which statement best describes the business model in your brokerage?

Response	Chart	Percentage	Count
Fee-based		32%	33
Commission splitting		33%	34
Combination of fee and commission		31%	32
Other:		3%	3
Total Responses			102

Approximately how many ends (lists or sales) did your brokerage complete in 2012?

Response	Chart	Percentage	Count
1-1000		70%	71
1001-2000		23%	23
2001-3000		5%	5
3001-4000		2%	2
4001-5000		0%	0

More than 5000	0%	0
Total Responses		101

Please provide more detail on the number of ends (lists or sales) your brokerage completed in 2012.

Response	Chart	Percentage	Count
1-10		7%	5
11-50		14%	10
51-100		20%	14
101-200		15%	11
201-300		4%	3
301-500		21%	15
501-1000		18%	13
Total Responses			71

What is the average age of the REALTORS® in your brokerage?

Response	Chart	Percentage	Count
19-30		1%	1
31-40		18%	18
41-50		48%	49
51-60		28%	29
61+		5%	5
Total Responses			102

Please tell us your age group:

Response	Chart	Percentage	Count
19-30		2%	2
31-40		5%	5
41-50		15%	15
51-60		34%	34
61+		45%	45
Total Responses			101

Does your brokerage provide either formal or informal education/training for your REALTORS®?

Response	Chart	Percentage	Count
Yes		79%	79
No		21%	21
Total Responses			100

Why does your brokerage not provide education/training for your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
You hire only experienced REALTORS®.		35%	7
You lack financial resources for education/training.		15%	3
You lack in-house training facilities.		15%	3
You lack in-house training expertise.		5%	1
You rely on REALTORS® to manage their own training through PDP or other sources.		70%	14
Other:		20%	4
Total Responses			20

Where do you source your education/training for your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
In-house expertise		92%	73
Franchise courses		44%	35
BCREA/Board		68%	54
External vendors		53%	42
Other:		4%	3
Total Responses			79

To what types of education/training resources does your brokerage have access? Select all that apply.

Response	Chart	Percentage	Count
Training room/classroom		87%	69
Projector/SMART board		44%	35
Computer access for trainees		68%	54
Electronic resources (e.g., PowerPoint presentations, videos)		72%	57
i-clickers		3%	2
Paper resources (e.g., modules, handouts)		73%	58
Other:		9%	7
Total Responses			79

Who is the main audience for your brokerage education/training?

Response	Chart	Percentage	Count
New REALTORS®		14%	11
Experienced REALTORS®		4%	3
Both new and experienced REALTORS®		82%	65
Total Responses			79

Which teaching methods are employed by your brokerage for formal education/training? Select all that apply.

Response	Chart	Percentage	Count
Classroom lecture		57%	45
Classroom interactive (e.g., learner presentation/hands-on/role-play)		65%	51
Classroom video or webinar		52%	41
Classroom assignments or homework (e.g., completing a contract, disclosure form)		32%	25
Online, self-paced courses		18%	14

without an instructor		16%	13
Online, instructor-facilitated course		4%	3
N/A		6%	5
Other:		6%	5
Total Responses			79

What types of informal education/training does your brokerage offer? Select all that apply.

Response	Chart	Percentage	Count
Mentorship		67%	53
Scheduled staff/sales meetings		89%	70
Via social media (e.g., Facebook, blogs, websites, email)		35%	28
Newsletters		34%	27
Online question and answers (with experts)		5%	4
Informational dialogue with Managing Broker		91%	72
Online articles (e.g., RECBC website)		52%	41
N/A		0%	0
Other:		5%	4
Total Responses			79

Who provides the formal education/training in your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Managing Broker		89%	70
On-staff trainer		29%	23
External content experts		39%	31
External course vendors		34%	27
N/A		3%	2
Other:		8%	6
Total Responses			79

Who provides the informal education/training in your brokerage? Select all that apply.




Response	Chart	Percentage	Count
Managing Broker		95%	75
On-staff trainer		19%	15
Internal experts		35%	28
External experts		28%	22
N/A		0%	0
Other:		4%	3
Total Responses			79

What methods do you use to assess how much your REALTORS® have learned during formal education/training? Select all that apply.













Response	Chart	Percentage	Count
No formal assessment		47%	37
Satisfaction survey at end of session		9%	7
Quiz/test		6%	5
Monitor and assess performance during session		23%	18
Monitor and assess performance on-the-job after session		46%	36
Review contracts and transactions		65%	51
Other:		3%	2
Total Responses			79

What methods do you use to assess how much your REALTORS® have learned during informal education/training? Select all that apply.

Response	Chart	Percentage	Count
No assessment		39%	31
Satisfaction survey at end of session		8%	6
Quiz/test		4%	3
Monitor and assess performance during session		24%	19

Monitor and assess performance on-the-job after session		52%	41
Review contracts and transactions		66%	52
Other:		1%	1
Total Responses			79

What are the content areas for which you provide education/training to your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
Contract writing/standard clauses		96%	76
Legal Issues (i.e., agency, disclosure, Real Estate Services Act)		94%	74
Risk management		76%	60
REALTOR® Code, Code of Ethics		65%	51
Business (e.g., sales, marketing, lead generation)		81%	64
Financial management		32%	25
Communication skills		59%	47
Use of various technology devices (e.g., computer, tablet, Smartphone)		57%	45
Use of applications (e.g., REALTORLink®, WEBForms®, Web conferencing software, Skype)		58%	46
Use of digital and video cameras		11%	9
Use of social media (e.g., blogs, Facebook, YouTube, Twitter)		52%	41
Other:		4%	3
Total Responses			79

As a Managing Broker/Broker Owner, how are you available to answer questions from your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
Phone		99%	78
Email		99%	78
In person		99%	78
Other:		6%	5
Total Responses			79

Does your brokerage charge fees for its education/training services?

Response	Chart	Percentage	Count
Yes		10%	8
No		90%	70
Total Responses			78

Do you provide either formal or informal education/training to REALTORS® outside of your brokerage?

Response	Chart	Percentage	Count
Yes		24%	24
No		76%	75
Total Responses			99

In what contexts do you provide either formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Teaching in the Residential Trading Services Applied Practice Course		33%	8
Teaching in the BCREA Professional Development Program		29%	7
Teaching/speaking at a college/university		0%	0
Speaking/presenting at Board sponsored events		17%	4
Speaking/presenting at		21%	5

conferences		12%	3
On contract to other offices/companies		33%	8
Total Responses			24

For what purpose do you participate in formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
To enhance the professionalism of the industry		83%	20
To “give back” to the industry		62%	15
To enhance your own professionalism/business branding		62%	15
To expand your referral network		25%	6
For the remuneration		17%	4
To provide diversity to your Managing Broker role		25%	6
You enjoy teaching		58%	14
Other:		8%	2
Total Responses			24


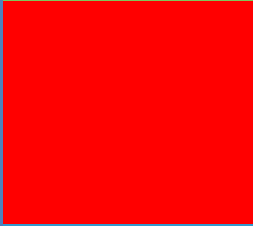





Please state the degree to which you agree with the following statements:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Total Responses
Education plays an important role in elevating the status of the real estate profession.	68 (70%)	27 (28%)	1 (1%)	1 (1%)	0 (0%)	97
Organized real estate has a role to play in providing education to licensed REALTORS®.	61 (63%)	32 (33%)	2 (2%)	1 (1%)	1 (1%)	97
BCREA’s PDP should provide	66 (68%)	28	3 (3%)	0 (0%)	0 (0%)	97

education on topics related to “hard skill” competencies, such as contracts, disclosure, agency, and the REALTOR® Code.		(29%)				
BCREA’s PDP should provide education on topics related to secondary competencies, such as areas of specialization (e.g., strata, green building, and hazardous sites).	42 (44%)	36 (38%)	13 (14%)	4 (4%)	1 (1%)	96
BCREA’s PDP should provide education on topics related to “soft skill” competencies, such as prospecting, marketing, and sales.	24 (25%)	16 (17%)	31 (33%)	15 (16%)	9 (9%)	95
BCREA’s PDP should provide education on topics related to business management, such as running a small business and managing a budget.	17 (18%)	34 (35%)	22 (23%)	16 (16%)	8 (8%)	97
BCREA’s PDP should provide education on basic customer service as it relates to the REALTOR® brand.	19 (20%)	26 (27%)	29 (30%)	14 (14%)	9 (9%)	97
BCREA’s PDP should provide education across all competency areas in real estate	24 (25%)	43 (45%)	20 (21%)	4 (4%)	4 (4%)	95

education.						
REALTOR® education is an important recruitment tool for your brokerage.	26 (27%)	26 (27%)	30 (31%)	12 (12%)	3 (3%)	97
There should be a mechanism for brokerages to have some of their in-house training accredited, according to established criteria, as part of the PDP program.	26 (27%)	22 (23%)	31 (32%)	13 (13%)	5 (5%)	97

Please identify which of the following education opportunities would benefit you as a Managing Broker. Select all that apply.

Response	Chart	Percentage	Count
Discussions with other Managing Brokers, facilitated by a professional (for example, a lawyer) on issues related to contracts, agency, and disclosure.		80%	77
Discussions with other Managing Brokers, facilitated by a professional, on issues related to managing a brokerage, such as managing conflict and using of technology.		73%	70
A "Legal Update for Managing Brokers" course		86%	83
A "Managing Broker's Business Skills" course		60%	58
A "Succession-Planning for Managing Brokers" course		42%	40
A "Train-the-Trainer" course		45%	43
Other:		5%	5
Total Responses			96

Summary Report: Broker Owner

To which member board does your brokerage belong?

Response	Chart	Percentage	Count
Fraser Valley Real Estate Board		10%	1
Real Estate Board of Greater Vancouver		20%	2
Kamloops and District Real Estate Association		10%	1
Kootenay Real Estate Board		10%	1
Northern BC Real Estate Board		20%	2
Okanagan Mainline Real Estate Board		10%	1
South Okanagan Real Estate Board		10%	1
Victoria Real Estate Board		10%	1
Total Responses			10

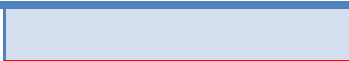

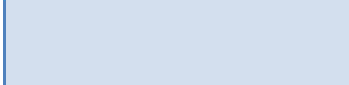

Which statement best describes the area(s) in which your brokerage services operate?

Response	Chart	Percentage	Count
Primarily urban/city		30%	3
Primarily rural/country		30%	3
A mix of both urban/city and rural/country		40%	4
Other:		0%	0
Total Responses			10




Which statement best describes your brokerage branding?

Response	Chart	Percentage	Count
Independently branded		60%	6
Associated with a brand		40%	4
Other:		0%	0
Total Responses			10




Which role best describes you?

Response	Chart	Percentage	Count
Managing Broker		0%	0
Broker Owner		100%	10
Managing Broker and Broker Owner		0%	0
Other:		0%	0
Total Responses			10




Which of the following describes your managing role?

Response	Chart	Percentage	Count
Selling manager		70%	7
Non-selling manager		20%	2
Other:		10%	1
Total Responses			10

Approximately how many REALTORS® are working in your brokerage?



Response	Chart	Percentage	Count
1-10		80%	8
11-25		10%	1
151-200		10%	1
Total Responses			10

On a day-to-day basis, how many active Managing Brokers does your brokerage have?




Response	Chart	Percentage	Count
1		80%	8
2		10%	1
3		0%	0
4 or more		10%	1
Total Responses			10

How many offices do you manage?



Response	Chart	Percentage	Count
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1		90%	9
2		0%	0
3		0%	0
4		10%	1
Total Responses			10





Which statement best describes the business model in your brokerage?

Response	Chart	Percentage	Count
Fee-based		10%	1
Commission splitting		80%	8
Combination of fee and commission		10%	1
Other:		0%	0
Total Responses			10

Approximately how many ends (lists or sales) did your brokerage complete in 2012?

Response	Chart	Percentage	Count
1-1000		90%	9
1001-2000		0%	0
2001-3000		10%	1
3001-4000		0%	0
4001-5000		0%	0
More than 5000		0%	0
Total Responses			10

Please provide more detail on the number of ends (lists or sales) your brokerage completed in 2012.

Response	Chart	Percentage	Count
1-10		22%	2
11-50		33%	3
51-100		22%	2
101-200		22%	2
201-300		0%	0
301-500		0%	0

501-1000	0%	0
Total Responses		9

What is the average age of the REALTORS® in your brokerage?

Response	Chart	Percentage	Count
19-30		0%	0
31-40		0%	0
41-50		50%	5
51-60		40%	4
61+		10%	1
Total Responses			10

Please tell us your age group:

Response	Chart	Percentage	Count
19-30		0%	0
31-40		0%	0
41-50		10%	1
51-60		50%	5
61+		40%	4
Total Responses			10

Does your brokerage provide either formal or informal education/training for your REALTORS®?

Response	Chart	Percentage	Count
Yes		60%	6
No		40%	4
Total Responses			10

Why does your brokerage not provide education/training for your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
You hire only experienced REALTORS® .		67%	2
You lack financial resources for education/training.		33%	1

You lack in-house training facilities.		67%	2
You lack in-house training expertise.		33%	1
You rely on REALTORS® to manage their own training through PDP or other sources.		100%	3
Other:		0%	0
Total Responses			3

Where do you source your education/training for your REALTORS®? Select all that apply.

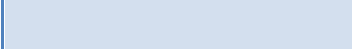


Response	Chart	Percentage	Count
In-house expertise		100%	6
Franchise courses		50%	3
BCREA/Board		83%	5
External vendors		50%	3
Other:		17%	1
Total Responses			6

To what types of education/training resources does your brokerage have access? Select all that apply.








Response	Chart	Percentage	Count
Training room/classroom		50%	3
Projector/SMART board		33%	2
Computer access for trainees		83%	5
Electronic resources (e.g., PowerPoint presentations, videos)		33%	2
i-clickers		0%	0
Paper resources (e.g., modules, handouts)		100%	6
Other:		33%	2
Total Responses			6

Who is the main audience for your brokerage education/training?








Response	Chart	Percentage	Count
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New REALTORS®		0%	0
Experienced REALTORS®		33%	2
Both new and experienced REALTORS®		67%	4
Total Responses			6

Which teaching methods are employed by your brokerage for formal education/training? Select all that apply.

Response	Chart	Percentage	Count
Classroom lecture		40%	2
Classroom interactive (e.g., learner presentation/hands-on/role-play)		40%	2
Classroom video or webinar		60%	3
Classroom assignments or homework (e.g., completing a contract, disclosure form)		20%	1
Online, self-paced courses without an instructor		40%	2
Online, instructor-facilitated course		40%	2
N/A		0%	0
Other:		20%	1
Total Responses			5

What types of informal education/training does your brokerage offer? Select all that apply.

Response	Chart	Percentage	Count
Mentorship		100%	6
Scheduled staff/sales meetings		83%	5
Via social media (e.g., Facebook, blogs, websites, email)		33%	2
Newsletters		33%	2
Online question and answers (with experts)		33%	2
Informational dialogue with Managing Broker		100%	6
Online articles (e.g., RECBC		100%	6

website)		0%	0
N/A		0%	0
Other:		0%	0
Total Responses			6

Who provides the formal education/training in your brokerage? Select all that apply.



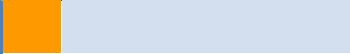
Response	Chart	Percentage	Count
Managing Broker		100%	6
On-staff trainer		17%	1
External content experts		50%	3
External course vendors		17%	1
N/A		0%	0
Other:		0%	0
Total Responses			6

Who provides the informal education/training in your brokerage? Select all that apply.








Response	Chart	Percentage	Count
Managing Broker		100%	6
On-staff trainer		17%	1
Internal experts		33%	2
External experts		17%	1
N/A		0%	0
Other:		0%	0
Total Responses			6

What methods do you use to assess how much your REALTORS® have learned during formal education/training? Select all that apply.








Response	Chart	Percentage	Count
No formal assessment		33%	2
Satisfaction survey at end of session		17%	1
Quiz/test		0%	0
Monitor and assess performance during session		17%	1





Monitor and assess performance on-the-job after session		50%	3
Review contracts and transactions		67%	4
Other:		17%	1
Total Responses			6

What methods do you use to assess how much your REALTORS® have learned during informal education/training? Select all that apply.





Response	Chart	Percentage	Count
No assessment		60%	3
Satisfaction survey at end of session		0%	0
Quiz/test		0%	0
Monitor and assess performance during session		20%	1
Monitor and assess performance on-the-job after session		60%	3
Review contracts and transactions		60%	3
Other:		0%	0
Total Responses			5

What are the content areas for which you provide education/training to your REALTORS®? Select all that apply.



Response	Chart	Percentage	Count
Contract writing/standard clauses		100%	6
Legal Issues (i.e., agency, disclosure, Real Estate Services Act)		100%	6
Risk management		83%	5
REALTOR® Code, Code of Ethics		100%	6
Business (e.g., sales, marketing, lead generation)		83%	5
Financial management		33%	2
Communication skills		100%	6

Use of various technology devices (e.g., computer, tablet, Smartphone)		50%	3
Use of applications (e.g., REALTORLink®, WEBForms®, Web conferencing software, Skype)		67%	4
Use of digital and video cameras		33%	2
Use of social media (e.g., blogs, Facebook, YouTube, Twitter)		50%	3
Total Responses			6



As a Managing Broker/Broker Owner, how are you available to answer questions from your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
Phone		100%	6
Email		100%	6
In person		83%	5
Other:		33%	2
Total Responses			6

Does your brokerage charge fees for its education/training services?

Response	Chart	Percentage	Count
Yes		17%	1
No		83%	5
Total Responses			6

Do you provide either formal or informal education/training to REALTORS® outside of your brokerage?

Response	Chart	Percentage	Count
Yes		22%	2
No		78%	7
Total Responses			9

In what contexts do you provide either formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Teaching in the Residential Trading Services Applied Practice Course		100%	1
Teaching in the BCREA Professional Development Program		100%	1
Teaching/speaking at a college/university		0%	0
Speaking/presenting at Board sponsored events		0%	0
Speaking/presenting at conferences		100%	1
On contract to other offices/companies		0%	0
Other:		0%	0
Total Responses			1

For what purpose do you participate in formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.



Response	Chart	Percentage	Count
To enhance the professionalism of the industry		100%	2
To “give back” to the industry		50%	1
To enhance your own professionalism/business branding		50%	1
To expand your referral network		50%	1
For the remuneration		50%	1
To provide diversity to your Managing Broker role		0%	0
You enjoy teaching		50%	1
Other:		50%	1
Total Responses			2






Please state the degree to which you agree with the following statements:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Total Responses
Education plays an important role in elevating the status of the real estate profession.	9 (90%)	1 (10%)	0 (0%)	0 (0%)	0 (0%)	10
Organized real estate has a role to play in providing education to licensed REALTORS®.	9 (90%)	1 (10%)	0 (0%)	0 (0%)	0 (0%)	10
BCREA's PDP should provide education on topics related to "hard skill" competencies, such as contracts, disclosure, agency, and the REALTOR® Code.	10 (100%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	10
BCREA's PDP should provide education on topics related to secondary competencies, such as areas of specialization (e.g., strata, green building, and hazardous sites).	5 (50%)	4 (40%)	1 (10%)	0 (0%)	0 (0%)	10
BCREA's PDP should provide education on topics related to "soft skill" competencies, such as prospecting, marketing, and sales.	3 (30%)	3 (30%)	2 (20%)	1 (10%)	1 (10%)	10
BCREA's PDP	3 (30%)	2 (20%)	4 (40%)	1 (10%)	0 (0%)	10

should provide education on topics related to business management, such as running a small business and managing a budget.						
BCREA's PDP should provide education on basic customer service as it relates to the REALTOR® brand.	3 (30%)	2 (20%)	5 (50%)	0 (0%)	0 (0%)	10
BCREA's PDP should provide education across all competency areas in real estate education.	5 (50%)	2 (20%)	3 (30%)	0 (0%)	0 (0%)	10
REALTOR® education is an important recruitment tool for your brokerage.	3 (30%)	2 (20%)	3 (30%)	1 (10%)	1 (10%)	10
There should be a mechanism for brokerages to have some of their in-house training accredited, according to established criteria, as part of the PDP program.	2 (20%)	0 (0%)	4 (40%)	3 (30%)	1 (10%)	10

Please identify which of the following education opportunities would benefit you as a Managing Broker. Select all that apply.

Response	Chart	Percentage	Count
Discussions with other Managing Brokers, facilitated by a professional (for example, a lawyer) on issues related to contracts, agency, and disclosure.		89%	8
Discussions with other Managing		78%	7

Brokers, facilitated by a professional, on issues related to managing a brokerage, such as managing conflict and using of technology.			
A "Legal Update for Managing Brokers" course		78%	7
A "Managing Broker's Business Skills" course		44%	4
A "Succession-Planning for Managing Brokers" course		33%	3
A "Train-the-Trainer" course		33%	3
Other:		0%	0
Total Responses			9

Summary Report: Managing Broker and Broker Owner

To which member board does your brokerage belong?

Response	Chart	Percentage	Count
Chilliwack and District Real Estate Board		4%	3
Fraser Valley Real Estate Board		7%	6
Real Estate Board of Greater Vancouver		17%	14
Kamloops and District Real Estate Association		2%	2
Kootenay Real Estate Board		5%	4
Northern BC Real Estate Board		5%	4
Okanagan Mainline Real Estate Board		17%	14
Powell River Sunshine Coast Real Estate Board		2%	2
South Okanagan Real Estate Board		10%	8
Vancouver Island Real Estate Board		21%	17
Victoria Real Estate Board		10%	8
Total Responses			82

Which statement best describes the area(s) in which your brokerage services operate?


Response	Chart	Percentage	Count
Primarily urban/city		25%	21
Primarily rural/country		10%	8
A mix of both urban/city and rural/country		61%	51
Other:		4%	3
Total Responses			83

Which statement best describes your brokerage branding?




Response	Chart	Percentage	Count
Independently branded		48%	40

Associated with a brand		52%	43
Other:		0%	0
Total Responses			83








Which role best describes you?

Response	Chart	Percentage	Count
Managing Broker		0%	0
Broker Owner		0%	0
Managing Broker and Broker Owner		100%	83
Other:		0%	0
Total Responses			83

Which of the following describes your managing role?

Response	Chart	Percentage	Count
Selling manager		69%	56
Non-selling manager		27%	22
Other:		4%	3
Total Responses			81

Approximately how many REALTORS® are working in your brokerage?

Response	Chart	Percentage	Count
1-10		60%	50
11-25		20%	17
26-50		5%	4
51-100		7%	6
101-150		4%	3
201-250		2%	2
More than 500		1%	1
Total Responses			83

On a day-to-day basis, how many active Managing Brokers does your brokerage have?

Response	Chart	Percentage	Count
1		87%	72

2		8%	7
3		1%	1
4 or more		4%	3
Total Responses			83

How many offices do you manage?

Response	Chart	Percentage	Count
1		80%	66
2		11%	9
3		8%	7
4		1%	1
Total Responses			83

Which statement best describes the business model in your brokerage?

Response	Chart	Percentage	Count
Fee-based		11%	9
Commission splitting		39%	32
Combination of fee and commission		46%	38
Other:		5%	4
Total Responses			83

Approximately how many ends (lists or sales) did your brokerage complete in 2012?

Response	Chart	Percentage	Count
1-1000		91%	73
1001-2000		4%	3
2001-3000		4%	3
3001-4000		0%	0
4001-5000		0%	0
More than 5000		1%	1
Total Responses			80

Please provide more detail on the number of ends (lists or sales) your brokerage completed in 2012.

Response	Chart	Percentage	Count
1-10		12%	9
11-50		25%	18
51-100		19%	14
101-200		16%	12
201-300		7%	5
301-500		15%	11
501-1000		5%	4
Total Responses			73

What is the average age of the REALTORS® in your brokerage?

Response	Chart	Percentage	Count
19-30		1%	1
31-40		12%	10
41-50		40%	33
51-60		39%	32
61+		7%	6
Total Responses			82

Please tell us your age group:







Response	Chart	Percentage	Count
19-30		2%	2
31-40		1%	1
41-50		16%	13
51-60		39%	32
61+		42%	35
Total Responses			83

Does your brokerage provide either formal or informal education/training for your REALTORS®?






Response	Chart	Percentage	Count
Yes		72%	56

No		28%	22
Total Responses			78





Why does your brokerage not provide education/training for your REALTORS®? Select all that apply.



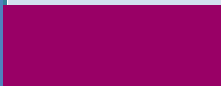

Response	Chart	Percentage	Count
You hire only experienced REALTORS®.		29%	6
You lack financial resources for education/training.		10%	2
You lack in-house training facilities.		10%	2
You lack in-house training expertise.		14%	3
You rely on REALTORS® to manage their own training through PDP or other sources.		71%	15
Other:		29%	6
Total Responses			21

Where do you source your education/training for your REALTORS®? Select all that apply.




Response	Chart	Percentage	Count
In-house expertise		86%	48
Franchise courses		45%	25
BCREA/Board		62%	35
External vendors		38%	21
Other:		12%	7
Total Responses			56

To what types of education/training resources does your brokerage have access? Select all that apply.









Response	Chart	Percentage	Count
Training room/classroom		66%	37
Projector/SMART board		39%	22
Computer access for trainees		64%	36
Electronic resources (e.g.,		62%	35

PowerPoint presentations, videos)			
i-clickers		2%	1
Paper resources (e.g., modules, handouts)		64%	36
Other:		11%	6
Total Responses			56

Who is the main audience for your brokerage education/training?










Response	Chart	Percentage	Count
New REALTORS®		10%	5
Experienced REALTORS®		13%	7
Both new and experienced REALTORS®		77%	40
Total Responses			52

Which teaching methods are employed by your brokerage for formal education/training? Select all that apply.


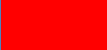



Response	Chart	Percentage	Count
Classroom lecture		38%	21
Classroom interactive (e.g., learner presentation/hands-on/role-play)		49%	27
Classroom video or webinar		45%	25
Classroom assignments or homework (e.g., completing a contract, disclosure form)		20%	11
Online, self-paced courses without an instructor		33%	18
Online, instructor-facilitated course		22%	12
N/A		16%	9
Other:		7%	4
Total Responses			55

What types of informal education/training does your brokerage offer? Select all that apply.







Response	Chart	Percentage	Count
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Mentorship		75%	42
Scheduled staff/sales meetings		86%	48
Via social media (e.g., Facebook, blogs, websites, email)		27%	15
Newsletters		25%	14
Online question and answers (with experts)		7%	4
Informational dialogue with Managing Broker		82%	46
Online articles (e.g., RECBC website)		54%	30
N/A		2%	1
Other:		7%	4
Total Responses			56

Who provides the formal education/training in your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Managing Broker		80%	45
On-staff trainer		30%	17
External content experts		45%	25
External course vendors		21%	12
N/A		9%	5
Other:		0%	0
Total Responses			56

Who provides the informal education/training in your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Managing Broker		96%	54
On-staff trainer		27%	15
Internal experts		34%	19
External experts		30%	17
N/A		2%	1
Other:		4%	2
Total Responses			56

What methods do you use to assess how much your REALTORS® have learned during formal education/training? Select all that apply.

Response	Chart	Percentage	Count
No formal assessment		40%	22
Satisfaction survey at end of session		11%	6
Quiz/test		0%	0
Monitor and assess performance during session		29%	16
Monitor and assess performance on-the-job after session		56%	31
Review contracts and transactions		67%	37
Other:		0%	0
Total Responses			55

What methods do you use to assess how much your REALTORS® have learned during informal education/training? Select all that apply.

Response	Chart	Percentage	Count
No assessment		32%	18
Satisfaction survey at end of session		11%	6
Quiz/test		2%	1
Monitor and assess performance during session		30%	17
Monitor and assess performance on-the-job after session		57%	32
Review contracts and transactions		64%	36
Other:		2%	1
Total Responses			56

What are the content areas for which you provide education/training to your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
Contract writing/standard clauses		91%	50

Legal Issues (i.e., agency, disclosure, Real Estate Services Act)		91%	50
Risk management		76%	42
REALTOR® Code, Code of Ethics		75%	41
Business (e.g., sales, marketing, lead generation)		67%	37
Financial management		27%	15
Communication skills		55%	30
Use of various technology devices (e.g., computer, tablet, Smartphone)		53%	29
Use of applications (e.g., REALTORLink®, WEBForms®, Web conferencing software, Skype)		53%	29
Use of digital and video cameras		15%	8
Use of social media (e.g., blogs, Facebook, YouTube, Twitter)		33%	18
Other:		4%	2
Total Responses			55


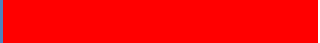
As a Managing Broker/Broker Owner, how are you available to answer questions from your REALTORS®? Select all that apply.

Response	Chart	Percentage	Count
Phone		96%	53
Email		93%	51
In person		98%	54
Other:		11%	6
Total Responses			55


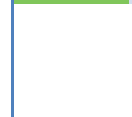




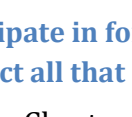
Does your brokerage charge fees for its education/training services?

Response	Chart	Percentage	Count
Yes		4%	2
No		96%	54
Total Responses			56





Do you provide either formal or informal education/training to REALTORS® outside of your brokerage?

Response	Chart	Percentage	Count
Yes		9%	7
No		91%	71
Total Responses			78

In what contexts do you provide either formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
Teaching in the Residential Trading Services Applied Practice Course		33%	2
Teaching in the BCREA Professional Development Program		0%	0
Teaching/speaking at a college/university		0%	0
Speaking/presenting at Board sponsored events		0%	0
Speaking/presenting at conferences		33%	2
On contract to other offices/companies		17%	1
Other:		33%	2
Total Responses			6

For what purpose do you participate in formal or informal education/training to REALTORS® outside of your brokerage? Select all that apply.

Response	Chart	Percentage	Count
To enhance the professionalism of the industry		57%	4
To “give back” to the industry		57%	4
To enhance your own professionalism/business branding		71%	5
To expand your referral network		57%	4


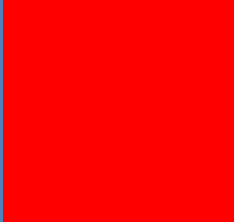





For the remuneration		29%	2
To provide diversity to your Managing Broker role		57%	4
You enjoy teaching		71%	5
Other:		0%	0
Total Responses			7

Please state the degree to which you agree with the following statements:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Total Responses
Education plays an important role in elevating the status of the real estate profession.	57 (77%)	16 (22%)	1 (1%)	0 (0%)	0 (0%)	74
Organized real estate has a role to play in providing education to licensed REALTORS®.	44 (60%)	26 (36%)	3 (4%)	0 (0%)	0 (0%)	73
BCREA’s PDP should provide education on topics related to “hard skill” competencies, such as contracts, disclosure, agency, and the REALTOR® Code.	55 (74%)	19 (26%)	0 (0%)	0 (0%)	0 (0%)	74
BCREA’s PDP should provide education on topics related to secondary competencies, such as areas of specialization (e.g., strata, green building, and hazardous sites).	31 (42%)	37 (51%)	4 (5%)	1 (1%)	0 (0%)	73
BCREA’s PDP	16 (22%)	22	20 (27%)	6 (8%)	10 (14%)	74

should provide education on topics related to “soft skill” competencies, such as prospecting, marketing, and sales.	(30%)					
BCREA’s PDP should provide education on topics related to business management, such as running a small business and managing a budget.	17 (23%)	21 (28%)	21 (28%)	11 (15%)	4 (5%)	74
BCREA’s PDP should provide education on basic customer service as it relates to the REALTOR® brand.	16 (22%)	22 (31%)	22 (31%)	6 (8%)	6 (8%)	72
BCREA’s PDP should provide education across all competency areas in real estate education.	19 (26%)	28 (38%)	16 (22%)	7 (9%)	4 (5%)	74
REALTORS® education is an important recruitment tool for your brokerage.	28 (38%)	15 (21%)	20 (27%)	5 (7%)	5 (7%)	73
There should be a mechanism for brokerages to have some of their in-house training accredited, according to established criteria, as part of the PDP program.	26 (35%)	13 (18%)	24 (32%)	8 (11%)	3 (4%)	74

Please identify which of the following education opportunities would benefit you as a Managing Broker. Select all that apply.

Response	Chart	Percentage	Count
Discussions with other Managing Brokers, facilitated by a professional (for example, a lawyer) on issues related to contracts, agency, and disclosure.		76%	56
Discussions with other Managing Brokers, facilitated by a professional, on issues related to managing a brokerage, such as managing conflict and using of technology.		68%	50
A "Legal Update for Managing Brokers" course		80%	59
A "Managing Broker's Business Skills" course		57%	42
A "Succession-Planning for Managing Brokers" course		53%	39
A "Train-the-Trainer" course		43%	32
Other:		4%	3
Total Responses			74