Teachers’ Guide

This version of the Teachers’ Guide supports all the learning units in the Toolbox.
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General overview

Purpose
The purpose of this Toolbox is to educate learners in real estate, particularly targeted towards those doing the Certificate IV in Property (Real Estate).

Structure of Toolbox

This Toolbox is designed for delivery either as a whole training course or in small sections. It can be used to assist in face-to-face teaching or for remote learning.

Units of competence within this Toolbox (nine core units and four elective units) have been grouped into three ‘streams’ of skill areas. This enables targeted delivery to suit learners’ needs. Each stream is broken down into units. The streams are colour coded throughout the Toolbox to enable easy recognition, and are as follows:

Sales. (Blue)
Contains the units:
- PRDRE11A Provide Property Appraisal
- PRDRE12A Establish and Expand Client Base
- PRDRE13A Obtain Property Listings
- PRDRE14A Market Property
- PRDRE15A Undertake Property Sale by Private Treaty
- PRDRE16A Monitor Sales Process
- PRDRE26A Conduct Property Sale By Auction
- PRDRE39A Prepare and Execute Documentation

Property Management. (Red)
Contains the units:
- PRDRE17A Effectively Manage Property and Account to Landlord
- PRDRE19A Perform and Record Property Management Activities and Transactions
- PRDRE31A Negotiate Effectively with Landlords and Tenants
- PRDRE32A Maintain and Protect Conditions of Rented Properties
Business Practices.  (Brown)

Contains the units:

- PRDRE10A  Manage Agency Risk
- PRDRE30A  Implement Personal Marketing Plan
- PRDPOD62A  Clarify and Confirm Property Information Requirements
- BSXFMI404A  Participate in, Lead and Facilitate Work Teams

Agency Services.  (Purple)

Contains the units:

- PRDRE21A  Provide Property Development and Marketing Services
- PRDRE22A  Present and Explain Property Reports

The streams can be directly accessed through the diary (in the office), the Training Room and the navigation bar (at top of screen) on each task page by clicking the “Diary” link. All performance criteria can be accessed via the main diary page for each stream.

The context

The Toolbox is based in a fictional real estate agency called Virtual Realty, in a fictional city named Blue Sky City. Virtual Realty represents ‘best practice’ in real estate, and incorporates modern techniques and methods in its business.

The learner interacts with the staff of Virtual Realty as they learn the role of a real estate agent.

We recommend that you complete the online ORIENTATION (available as a link from the ‘office’ page and all stream pages) and familiarise yourself with the Toolbox before commencing delivery. The orientation is also provided in PDF format to enable learners to print the document and retain it for easy reference while they’re using the Toolbox.
What’s new in Series 5?

If you are familiar with the previously released Series 4 Virtual Realty Toolbox, you will notice that this new resource has had a few changes. These are detailed below:

- The Virtual Realty office has had a renovation! You will still find the same items in here, but it has a new interface and we have made the menus easier to locate, read and use.

- The Virtual Realty Training Room also has a new look. Everything that was in Series 4 is still available, with the addition of a few new items to go with the new units in Series 5.

- The Virtual Realty office, the Blue Sky City map and Training Room now offer access to a text-based alternative screen that contains all the menu items. This would be useful for people with slower internet access or those using screen reader equipment. Once accessed, the text-based menu provides easily navigated links to all items available.

- A new stream; "Agency Services" has been added to the Diary. This new stream is colour coded purple and contains a couple of new units. You will also notice that the unit 'Present and explain property reports' has been relocated to the new stream (it was previously in the Business Practices stream).

- A search facility has been added to the “Archived Articles” section of the REIBS website. This will help learners locate specific text within the large number of articles provided in this resource.

- The five new units in Series 5 of the Virtual Realty Toolbox are all electives. The addition of these units now enables the Toolbox to support the full number of competencies required for the Certificate IV in Property qualification. The new units (and the stream in which they are located) are listed below:
  - PRDRE17A – Effectively manage property and account to landlord (Property Management stream)
  - PRDRE21A - Provide property development and marketing services (Agency Services stream)
  - PRDRE31A - Negotiate effectively with landlords and tenants (Property Management stream)
  - PRDRE39A - Prepare and execute documentation (Sales stream)
  - BSXFMI404A - Participate in, lead and facilitate work teams (Business Practices stream)
Preparing to use the Toolbox for training delivery

Each time you plan to use the Toolbox and/or its resources for your training delivery, you should check that all the content is still relevant and accurate in terms of legislation and regulations in your State/Territory.

Perhaps the one item most likely to need updating is the number of links to external websites that are provided throughout the Toolbox. As we cannot control the set up of external websites, you may find that URLs provided are no longer correct, or that the content on the website referenced is no longer valid. To help you in the task of checking URLs, we have designed a simple to use tool. Here’s what to do:

1. Locate the ‘TOOLS’ folder, and the file ‘chklinks.htm’, as pictured below – open chklinks.htm by double clicking it.

2. The file will open in a browser window, and look like this:
Instructions on using this tool are provided up the top of the page, but here’s a step by step guide:

3. All the URLs in the Toolbox are listed on the left. Simply click each one to be taken to its corresponding website – this will open in a new browser window. Check that the URL is still valid, and if so – close down the window and return to the URL checker.

When you return, you’ll notice that the URL you just checked now has a tick in the box to its left, as shown in the picture below:

That’s it – no further action required if the URL is still valid.

3. If you go to check a URL and find that the web address has changed (for example, the page you want is now located elsewhere on the external site) – you’ll need to change the URL inside the Toolbox.

Here’s how to do it:

- Firstly, find the page you’re looking for, then copy the new URL from the address field, as shown below:

- Come back to the URL checker, and paste the new URL in the text box to the right, as shown below:
4. Once you have checked all the URLs, click the **SUBMIT** button down the bottom of the URL checker.

All the details of replacement URLs will go into the text field underneath the button, as shown below:

![Image of URL checker](image)

**NOTE:**

If, however, a URL no longer exists or is invalid, you may need to change some of the content of the Toolbox – for example, the page where the link resides may make reference to the external site so this will need to be deleted. You will need to locate the URL within the learning units and amend the HTML on the page to fix this.

That’s it for the URL checker… there’s just a couple more things to do… don’t close the URL checker just yet!
5. Now open the file ‘extlnk.js’, which you’ll find in the folder called ‘js’, as pictured below:

![Folder structure showing extlnk.js file]

**NOTE:** you will need to open this file using Notepad or a HTML editor such as DreamWeaver.

6. Once you have the extlnk.js file open, it will look like this:

![Content of extlnk.js file]

Wipe out all the text in this file, either by highlighting and then deleting it, or use Edit/Select All from the menu, then delete.

7. Go back to the URL checker, and copy all the content from the text box below the SUBMIT button, then paste it into the extlnk.js file. You now have all the new URLs in this file, so you can close it (remember to save it!!).

That's it! This process has just updated all the URLs in the Toolbox.
Design objectives

The Toolbox has been designed according to these three main objectives:

1. Creating problem based learning activities, where the learner takes responsibility for their own learning. Learners are given guidance to complete a task and access the appropriate resources to carry it out.

2. Flexibility for the online teacher, providing you with more options for using the Toolbox to suit the different needs of your learners. Collaborative activities such as discussions are suggested in the teacher’s guide, but they are not included as part of the Toolbox content.

3. Three different levels of learning are offered, with learners being given the choice of how much they want to learn about each process. Learners with knowledge of the real estate industry may choose to work through each activity without requiring any additional training, however novice learners may need to access all three levels of learning where they can take advantage of the range of learning experiences provided through the Toolbox.

Target audience

The end-users will largely be learners who are completing the Certificate IV in Property (Real Estate). These learners are expected to be mature adults aged 25 – 50 who are either:

- already in the industry and wanting to up skill or specialise,
- working towards a Diploma in Property,
- continuing their training after entering the industry through a traineeship at Certificate III level,
- working on their personal development,
- completing the minimum licensing requirement to become a real estate agent, or
- completing the licensing requirement to become a property manager.

Since the target audience will be mature and possibly already in full time employment, an online learning environment is appropriate as it provides flexibility for the learner. There is a focus on the learner accessing the resources themselves, without being given too many directions. However it is anticipated that the learners will have beginner to average computer skills, though not necessarily be familiar with online learning environments. To assist learners clear instructions will be given, particularly in the orientation.
Underpinning ideas

Each activity within a stream consists of one or more tasks. Resources are suggested and/or provided to assist the learner to complete the tasks required. The online teacher can organise additional exercises such as discussions, and this Teachers’ Guide provides many suggestions for enhancing the learning experience through collaborative work.

The learning activities are designed to develop the following key skill areas required for competency in the real estate industry:

- research skills
- decision making
- planning
- analysing information
- marketing techniques
- administration
- time management
- written and verbal communication skills
- records management
- team work
- organising
- collating data
- literacy and numeracy
- analysis skills
- budgeting
- problem solving

Facilitation requirements

Because teacher focused instructions are not included in the content of this Toolbox, you will need to develop a strategy for communicating with your learners and providing direction to the activities. For example, in some activities there are suggested points at which you should provide an instruction such as ‘please email your completed comparative market analysis by November 23rd’. We recommend that you read through the relevant section in this guide and preview the Toolbox content before commencing delivery of each activity so that you can prepare and schedule these events.

About this Teachers’ Guide

This guide has been developed to assist and support you in delivering this online course. It explains all the activities the Toolbox contains, and offers suggested customisation and delivery strategies that will provide you with the opportunity to maximise the learning experience for your online group, and take full advantage of the collaborative learning environment that can be achieved through facilitated discussions and information sharing amongst the group of learners.
This guide covers every stream and all activities within the Toolbox. Three other versions of this guide have been provided on the CD, as follows:

- tg_sales.pdf supports units in the Sales Stream only.
- tg_busns.pdf supports units in the Business Practices Stream only.
- tg_agncy.pdf supports units in the Agency Services Stream only.
- Tg_propm.pdf supports units in the Property Management Stream only.

This teachers’ guide does not cover installation instructions – these are contained in the ‘Installation Guide’ provided on the CD (instal_g.pdf). We recommend that you seek technical assistance with installing the Toolbox if you are not competent in this area.

The delivery strategies detailed in this guide are by no means exhaustive – we encourage you to use your creativity to develop additional meaningful learning experiences for your group. The Toolbox can ‘stand alone’ and serve as a learning tool with minimum input from you, however this may not be the most effective delivery strategy.

Your notes…
Organising structure and key features of the Toolbox

**Home Page (office of Virtual Realty)**

<table>
<thead>
<tr>
<th>Briefcase</th>
<th>Laptop</th>
<th>Diary</th>
<th>Tips</th>
<th>Training Room</th>
<th>Orientation</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains print resources such as forms used and the Blue Sky City map.</td>
<td>Contains electronic resources such as websites and databases.</td>
<td>Details the streams and activities within the Toolbox.</td>
<td>Contains all the tips that are given in the learning units.</td>
<td>Provides access to all learning units and tasks within the Toolbox.</td>
<td>Provides a comprehensive guide to the Toolbox for first-time visitors.</td>
<td>Details the development team, contributing organisations and other acknowledgments.</td>
</tr>
</tbody>
</table>

**RESOURCES**

- Task Page (Level 1 learning)
- Training Manual (Level 2 learning)
- Interactions and tutorials (Level 3 learning)
Tools required

Users will need a computer (PC or Mac equivalent) with the following software and hardware:

- Microsoft® Internet Explorer 5 or higher
- or Netscape® Navigator 4.7 or higher
- Macromedia® Flash® 5 player* or higher
  (http://www.macromedia.com/downloads/)
- Adobe® Acrobat® Reader® 4* or higher
  (http://www.adobe.com/products/acrobat/readstep2.html)
- Apple® Quicktime® Movie Player
  (http://www.apple.com/quicktime/download)
- Microsoft® Word
- sound card and speakers.

*NOTE: The Toolbox will immediately detect if a user does not have the required plugins and provide directions to specific web sites.

Tools and resources provided

Course Introduction/Orientation

Learners and online teachers are strongly encouraged to work through the orientation (accessible from the home page and all stream pages) before beginning any of the activities in the Toolbox. The orientation covers:

- Virtual Realty and Blue Sky City
- the course and the resources available
- on screen features
- additional features
- the Training Room
- finding your way around Virtual Realty
- working through activities
- the office at Virtual Realty
- recognition of existing skills
- tips to help you learn online.

The orientation has also been provided as a PDF document on the CD (orient.pdf). You may like to add a link to this document for your learners.
Diary
This contains all the streams and units that make up the Toolbox, and is shown as a graphic on the table in the office page. The first step is to click on the diary, opening a menu from which you can select a stream. Selecting a stream displays the units within that particular stream. Clicking on one of the units will open the first task page. You can also look at the performance criteria for all units in a stream by clicking on the link in the menu.

The task page
Having selected an activity from the list of units, the learner is presented with the task page. In some activities, there may be more than one task – this is indicated by graphic icons in the left-hand side bar that can be used as a quick navigation to the start of each individual task. The task page is level 1 learning, and may be all that is required for learners with industry experience to complete the task and/or activity.

Training Manual
Should further learning be required to enable the learner to complete the task, level 2 learning can be accessed via the Training Manual icon that appears on the task page. Inside each Training Manual is further training information for each activity. If more training is required, the learner can access further information, which is level 3 learning. This includes interactive exercises, tutorials and learning experiences and is contained within the Training Manual.

Training Room
This is where all the Training Manuals for each activity are stored. From the Training Room screen, the learner should select the stream they require and then select which manual they require from the list presented. The Training Manuals typically contain further information relating to the task, such as interactive documents and a more detailed explanation of each step. This level of learning would be most appropriate for self-directed learners or those with a little industry experience. Books, ‘how to’ guides, puzzles and URL’s are also housed here and can be accessed by clicking on the relevant graphic. The Training Room will usually be accessed from the task page, however a link is provided from the top navigation bar and the office page.

Tips
Throughout the units, the staff at Virtual Realty will appear to provide the learner with ‘tips’ that will assist them. These tips are individually presented at appropriate points through the unit, and can also be accessed via the office.

On the Grapevine
Throughout the units, the residents of Blue Sky City may have some information that is relevant to the learner. These work in the same way as the tips, but are not housed in any central repository, as the information is largely anecdotal and relevant only to specific tasks.

In some cases, this information may be relevant to the task, so it will be accessible from both the task page and the Training Manual.
Follow the Leader
This is present on some of the task pages in situations where the learner needs to observe activities and fill out documentation for their task. These are simulations of activities that a real estate agent performs.

Laptop
Available from both the office and the navigation bar, the Laptop contains the following electronic resources to support learning:

- REIBS website – this is the official website of the Real Estate Institute of Blue Sky and includes sold and listed property information, suburb profiles and statistics, buyer’s guide and archived news articles. This site is modelled on Real Estate Institute web sites around Australia.
- Government of Blue Sky City website – this contains government information such as Certificate of Titles and sold property information and is modelled on similar government resources used across Australia by real estate staff.
- Databases – this contains the different databases that are used by staff at Virtual Realty.

Briefcase
Accessible from both the office and the navigation bar, the Briefcase contains resources that may be appropriate for a task. These resources are:

- An interactive map – enables you to look at the area of Blue Sky City, and provides viewing access to particular properties for the purpose of viewing, appraising etc during specific tasks and/or activities. Also contains suburb profiles with photos of the area.
- Dictionary – contains definitions of terms that are used in real estate. These terms are linked to the dictionary throughout all activities and tasks, enabling easy access to the definitions. A search by letter facility is also provided in the dictionary.
- Marketing material – Virtual Realty marketing brochures and other information used to promote the services of the agency.
- Forms – forms such as checklists and documentation used at Virtual Realty that the learner is required to use (and, where appropriate, submit for your feedback) during tasks and/or activities. These forms and checklists are modelled on documentation used in real estate agencies across Australia.

Communication tools
Chat, e-mail and the discussion board are contained here and accessed via the icon on the task pages and inside the Laptop if you’re in the Virtual Realty office. You will need to link these up with your organisation’s learning platform; such as WebCT, Janison, Blackboard etc.
Customisation methods
NOTE: we recommend that you always retain the original files in their CD format so that you have an original copy of the Toolbox.

‘Welcome’ screen
This page is HTML and can be easily modified.

Office
The office is a Flash movie and it can only be altered using Flash, however all links and text can be changed via the external text file (office.txt). You may need technical assistance with this. Changes made to the office may also need to be changed elsewhere, since the items on this page are linked with other pages throughout the Toolbox. It is not anticipated that this page will require customisation, unless you wish to remove an object or add an additional feature.

Orientation
Text can be easily changed by accessing the HTML code.

Training Room
The Training Room is a Flash movie and it can only be altered using Flash, however all links and text can be changed via the external text file (training.txt). You may need technical assistance with this. Changes made to the Training Room may also need to be changed elsewhere, since the items on this page are linked with other pages throughout the Toolbox. It is not anticipated that this page will require customisation, unless you wish to remove an object or add an additional feature.

Flash files
The text in all Flash movies (within an activity) can be changed simply by altering the text in the external text file (*.txt), without having to alter the Flash movie. This enables you to customise the content without needing technical assistance, however a basic knowledge of HTML is required.

Resources
The resource links that are in the Briefcase and Laptop in the navigation bar are in a Flash file within each folder on the CD. The resources can be changed, by altering the text in the external text file (look for the *.txt file in each folder). You can add, delete or alter links, however you must be aware of the small amount of room available for adding additional links. All changes to the resource links should also be made in the office page, since the Briefcase and Laptop are also accessible here. Communication tools can be deleted if necessary.

Task/activity page
The task page can be altered easily by changing the HTML. Comments within the HTML will assist you in locating the relevant code. If you are unsure, seek technical assistance.
Training Manual
The steps can be changed easily by altering the HTML, however you cannot have more than eight steps without making substantial changes to the code.

Graphics/photos
This Toolbox incorporates many photos of properties that you may wish to replace to suit your own State/Territory. Simply locate the relevant image file (eg; ‘kaluka.jpg’) in the HTML code and replace it with your own image.

Customising the Toolbox for single unit delivery

If you only want to offer one or two units from the toolbox, you can simply disable the links to the unit’s corresponding task page. However, to perform this change you will need to amend an .xml file and a javascript file, which requires a level of technical know-how.

Full details of how to customise the Toolbox can be found inside the installation guide that is provided on your CD. We recommend that you seek assistance from a technical person to perform any changes at the root directory level, however you could do it yourself by following the instructions in the installation guide.

Practical work and suggested assessment approaches

Learners should already be sponsored by an agency before they begin, so this may enable them to complete workplace assessments.

Each task could be submitted for assessment, by getting the learner to send (by e-mail, fax or post) any documentation that they have worked on.

You should check the assessment requirements for qualification in your own State/Territory.
## Activity guide

### Provide Property Appraisal (Sales stream)

Unit of competence covered:

**PRDRE11A – Provide Property Appraisal**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| **1. Obtain and analyse market information.** | 1.1 Appropriate sources of information are identified and relevant information is obtained by accessing databases.  
1.2 Factors affecting the returns on property are identified and evaluated within known market trends. |
| **2. Research and record property factors and rental price indicators.** | 2.1 Market conditions and vacancy factors are thoroughly researched and evaluated within the agency context.  
2.2 Price indicators are established that reflect local factors and conditions and which can be applied within agency guidelines. |
| **3. Formulate accurate advice to assist clients in making informed decisions.** | 3.1 Information affecting property prices is presented as factual, up-to-date and relevant to the property under discussion.  
3.2 Local market factors affecting returns on property are explained to the client and included in discussions about relevant options.  
3.3 Relevant information is provided to the client in written reports. |
| **4. Maintain relevant property records to assist appraisals and listings.** | 4.1 Records are maintained to identify past and current property trends and opportunities for listings.  
4.2 Databases are maintained to identify past and current property trends and conditions relevant to the property market serviced by the agency. |
Purpose of activity

Learners will learn how to research, analyse and collate relevant information to prepare and present a property appraisal for a potential vendor.

Underpinning knowledge and skills

- basic comparison techniques,
- research skills,
- report writing,
- map reading and interpretation,
- communication skills, and
- ability to identify local market conditions.

Summary of activity

The learner is required to follow the 7 steps involved in providing a property appraisal. A property is presented (23 Barran St, Kaluka), and all resources required can be found in the Laptop, Briefcase and the task page. The 7 steps are:

1. Obtain the Certificate of Title.
2. Inspect the property.
3. Perform a comparative market analysis.
4. Check for other factors that may affect property price.
5. Update the Virtual Realty database.
6. Compile a property appraisal report.
7. Present the property appraisal to the client.

Special features

The checklists that are utilised in steps 2 and 3 are accessible to the learner in a PDF or Word format, via the Briefcase. This allows the learner to either print out the checklists for completion or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.

Challenge

Learners who do not fully investigate and research all the resources that support this activity could submit an inappropriate appraisal price for the properties presented.

Assessment suggestions

Learners could submit their appraisal documents for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used. You may choose to ask learners to present their appraisals to each other (or to you) to enable assessment of their skills in this area.
Alternative approaches and suggested collaboration activities

The following information relates to the seven steps in the Provide Property Appraisal Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams. You may choose for learners to appraise more properties available from the Blue Sky City map – try 10 Ocean Glades Circle, Ocean Glades, or 8 Tappa Crescent, Blue Ridge.

<table>
<thead>
<tr>
<th>Step 1: Obtain a Certificate of Title.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires learners to access the Blue Sky City web site and find the COT for each property presented.</td>
</tr>
<tr>
<td>Learners could obtain a copy of a Certificate of Title for their own property or a friend’s and have a look at the information it contains. You could generate a group discussion around this and encourage learners to compare the information they found. This could be particularly effective if learners are from the same geographical area.</td>
</tr>
<tr>
<td>You could set a task for learners to find how this would be carried out in their own State/Territory – where would they resource a Certificate of Title from? Results could be posted to the Discussion Board.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2: Inspect the property.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using the Blue Sky City map, learners are required to view each property’s features and use the property appraisal checklist (in Briefcase) to identify each property’s features.</td>
</tr>
<tr>
<td>Learners could inspect their own or a friend’s house and fill out the checklist at the same time. When learners have viewed the property they could post their summary to the discussion board. You could then facilitate a discussion around the different things learners noticed about the property, and use this to ensure that all the main features have been identified before learners progress to the next stage.</td>
</tr>
<tr>
<td>You may choose to replace the Virtual Realty checklist with an actual checklist used in an agency to make this more relevant to learners.</td>
</tr>
<tr>
<td>Learners already in the workplace could go with an agent to an inspection and observe and fill out a checklist themselves and compare it to the agent’s checklist. They could then post a summary of this experience to the discussion board for others to read.</td>
</tr>
<tr>
<td>You could consider asking learners to submit their completed property appraisal checklist to you for feedback.</td>
</tr>
</tbody>
</table>
### Step 3:
Perform a comparative market analysis.

Using the form provided (in Briefcase), learners are required to research similar properties sold and listed in Blue Sky City in order to arrive at a final appraisal price for the subject property.

Learners could appraise their own homes (or that of a friend) and then conduct a comparative market analysis.

Learners could look for suitable websites in their own State/Territory that they could use to search for similar properties. For example, Real Estate Institute web sites contain this information (note, however, that ‘member access’ may be required). Learners could post the websites or resources that they find within their own State/Territory to the discussion board.

You could generate a discussion around the properties used for the comparative market analysis – for example, ‘...what did you think of property x...’ to encourage learners to look closely at a property’s features.

### Step 4:
Check for other factors that may affect property price.

Learners are required to access market information from On the Grapevine or in the archived articles in the REIBS website, which they will take into account in their appraisal process. Look out for ‘red herrings’ in the Grapevine information.

The learners could answer the question about additional factors by posting a response to the discussion board, enabling you to check that they are researching information correctly and identifying all relevant factors. Different factors could be allocated to one or more learners and they could research this factor and post their findings on the discussion board. Learners could research local developments in their area and post their findings on the discussion board. Alternatively, you could locate (or ask learners to locate) an article relating to market factors and ask learners to post their thoughts on how this could affect property prices.

Learners could e-mail you with their market findings, including:

- definitions of the two different types of market
- what they think the current market is
- what factors are responsible for this market condition
- whether they think there will be any short or long term changes to the market.
### Step 5: Update the Virtual Realty Database.

Learners are required to input the information gained through steps 1 – 5 in the database used at Virtual Realty.

Learners who are sponsored by an agency could explore that agency’s database to find out what type of information is captured. You could then invite learners to post this information to the discussion board and facilitate a discussion around the main points.

### Step 6: Compile a property appraisal report.

Learners are provided with examples of a completed property appraisal report, including the marketing materials used.

Learners who are sponsored by an agency could find out what is used at their agency when compiling a property appraisal. You could then facilitate a discussion comparing the property appraisal reports and discuss the reasons behind any variations.

Alternatively, you could encourage learners to have their own property appraised and invite them to post a message to the discussion board describing the report they received from the agency.

### Step 7: Present the property appraisal.

Learners are provided with a scenario showing how Rick Hamilton presents a property appraisal.

Learners could ‘present’ their property appraisal reports to each other via an online chat. You could pair learners up or arrange small groups for this exercise. Learners could then provide each other with feedback.

Alternatively, you could encourage learners to have their own property appraised and invite them to post a message to the discussion board describing the way in which the appraisal was presented to them.

### Preparing learners for the resources

If you choose to do discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.
Other related resources or activities

Step 3 in the Training Manual of ‘Obtain Property Listings’ provides detailed information on making a listing presentation, which is usually done at the same time the property appraisal report is presented. This information may come in handy when completing step 7 – Present the property appraisal.

Ways of customising the resources

Properties could be replaced to suit the ones in your area.

Ways of promoting collaboration between learners

Since a property appraisal is by nature somewhat subjective, learners should be encouraged to reflect on their findings and compare their own data with that of others.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.

You could also consider asking learners to appraise actual properties (such as that of a friend or family member) for a more ‘real-life’ learning experience.
Establish and Expand Client Base (Sales stream)

Unit of competence covered:

**PRDRE12A – Establish and Expand Client Base**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| 1. Service existing client base. | 1.1 Existing client base is maintained in accordance with agency business plan and marketing strategy.  
1.2 Opportunities are identified for agency sales and listings. |
| 2. Develop a business network. | 2.1 Contact is made with potential clients consistent with agency image and marketing plan.  
2.2 Listings are obtained by following procedures consistent with agency protocols.  
2.3 Business opportunities are generated by follow-up and networking activities.  
2.4 The agency marketing strategy and business goals and objectives are consistently met within all business networking activities. |
| 3. Implement strategy to expand client base. | 3.1 Promotional activities are undertaken which generate enquiries and inform prospective vendors of agency services.  
3.2 Marketable listings are obtained by following up all enquiries.  
3.3 Attainable listing targets are set in budgets and marketing strategy. |
| 4. Communicate outcomes of prospecting activities to key stakeholders. | 4.1 Staff initiative and client confidence in agency services is fostered and supported by communication of the outcomes of prospecting activities.  
4.2 Accessible records are maintained to provide an accurate and useable source of agency information. |
5. Maximise repeat business opportunities.

5.1 Contact with prospects is maintained over time to ensure clients’ informed consent to agency activities.

5.2 Information likely to be of interest is circulated to prospective clients, and followed up at strategic intervals.

5.3 Relevant follow-up discussions are held with clients to facilitate stated business needs.

5.4 Marketing activity results are recorded in accessible databases to provide useful market references.

**Purpose of activity**

Learners will learn how to identify, expand their network and record details of potential clients.

**Underpinning knowledge and skills**

- Zoning and other regulations affecting property usage.
- Market trends.
- Development opportunities and general knowledge of local markets.
- Statutory and common law duty of care in relation to listing in the property market.
- Agency listing practices and industry codes of practice.
- Marketing principles.
- Client database management principles.
- Zoning and other regulations affecting property usage.
- Planning and organising work.
- Communication, including telephone techniques and selling techniques.
- Desktop publishing.
- Information management, including record keeping.
- Business correspondence concerning client base.
- Ability to access and apply legislation relating to property usage.
- Market trends research strategies in relation to establishing and expanding client base.
- Property appraisals.
Summary of activity

The learner is required to follow the 6 steps involved in establishing and expanding their client base. The learner needs to carry out these prospecting activities using resources that can be found in the Laptop, Briefcase and the second task page. The 6 steps are:

1. Setting targets and prospecting plans.
2. Conducting agency and individual promotional activities.
3. Prospecting for listings.
4. Contacting potential clients.
5. Maintaining your client database.
6. Creating prospecting reports.

Special features

The forms that are used throughout are available in Word format, via the Briefcase. This allows the learner to either print out the documents for completion or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat. For the task, the learner will be required to watch a simulation of Rick’s prospecting activities and update Rick’s client database, which is in the Databases section of the Laptop.

Challenge

Learners who do not closely watch Rick prospecting may not extract all the details possible to put in the client database.

Assessment suggestions

Learners could submit an updated version of Rick’s client database for assessment, their two month prospecting plan and their introductory letter for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used.
**Alternative approaches and suggested collaboration activities**

The following information relates to the six steps in the Establish and Expand Client Base Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th><strong>Step 1:</strong> Setting targets.</th>
<th>Learners could discuss their target income with other learners using the discussion board. Learners who are already sponsored by an agency could discuss their target income with the agency licensee.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires learners to access the Prospecting activity chart in the Forms section of the Briefcase to calculate the prospecting required to acquire their target income.</td>
<td>Ask learners to collect real estate agency promotional material over a period of time and ask them: How did it promote the agency/agent? Was the flyer followed up? For each piece of promotional material shown in this step of the Training Manual, the learners could explain why this type of promotional material was used. Suggested answers are: <strong>August promotion</strong> Due to their reference value, recipes tend to be kept for a long period of time. By having Virtual Realty’s profile on the other side of the card customers will inadvertently also keep this information. <strong>September promotion</strong> Traditionally, Spring is renowned as being one of the best times to sell property. Gardens are usually green and lush after Winter and the weather is starting to warm up. This tends to increase the amount of buyer activity in the marketplace. <strong>October promotion</strong> This brings the property owner’s attention to the fact that several houses have been sold recently in their area by this real estate agency.</td>
</tr>
</tbody>
</table>
Property owners may decide to use your company if you are continually demonstrating that you are active in the area.

**November promotion**
This business directory is distributed to all businesses and private residences in Blue Sky City and it is used regularly. This enables Virtual Realty to promote themselves to a larger audience. The directory will probably be kept by recipients for a long period of time which in effect provides advertising for this time period.

**December promotion**
Christmas is a great time to strengthen your relationship with property owners. Simply sending a season’s greeting card enforces the fact that you are genuinely interested about the people in your area. It is important for a real estate agent to nurture their client relationships as this can lead to repeat business and referrals.

**January promotion**
People usually get a calendar for the new year in January and if they use the Virtual Realty calendar, it will be a constant reminder of the agency for the entire year.

### Step 3:
Prospect for listings.

Learners are presented with all the different ways that you can prospect for clients. Learners are required to create a prospecting plan that incorporates these activities.

You could ask learners to respond on the discussion board to the question - Have you ever referred someone to a friend or been referred by someone?

Ask learners the question - Why do you think advertising is used?
A suggested answer is: Advertising enables you to reach potential buyers from different locations as well as in you own area. Ongoing advertising also helps to make potential clients familiar with your company.

Learners could create their own prospecting material.
### Step 4: Contacting potential clients.

Learners learn about communication techniques they can use when dealing with clients in person and on the telephone.

Learners could practise contacting potential clients using the chat room. Learners could search the Internet looking for articles on speaking to potential clients.

Learners could write a script for contacting potential clients. These scripts could be posted to the discussion board or e-mailed to the online teacher.

A discussion board exercise could be used where learners research the doorknocking laws in their state and post their findings.

### Step 5: Maintain your client database.

Learners are required to input the information gained through prospecting, into a client database. The database is used to keep up to date information on prospective clients.

Learners who are sponsored by an agency could explore that agency’s database to find out what type of information is captured. You could then invite learners to post this information to the discussion board and facilitate a discussion around this.

### Step 6: Write a prospecting report.

Learners are provided with examples of completed prospecting reports. These summarise an agent’s prospecting activities over a period of time.

Learners who are sponsored by an agency could look at their agency’s prospecting report form.

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**Preparing learners for the resources**

If you choose to do discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.
Other related resources or activities

Many other units in the Sales Stream highlight how everyday activities give you an opportunity to expand your client base. You may like to encourage learners to explore the other Training Manuals available in the Virtual Realty Training Room and get them to identify when these opportunities arise.

Ways of customising the resources

Properties could be replaced to suit the ones in your area. Forms that are used in your State/Territory could replace existing forms.

Ways of promoting collaboration between learners

Prospecting activities are varied and learners can be quite creative, so ideas can be shared between learners.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Market Property (Sales stream)

Unit of competence covered:

**PRDRE14A – Market Property**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop marketing plan for subject property.</td>
<td>1.1 An information service on the sale or lease of property is provided to prospective purchasers and lessors.</td>
</tr>
<tr>
<td></td>
<td>1.2 The benefits of property presentation are understood and confirmed with the principal.</td>
</tr>
<tr>
<td></td>
<td>1.3 Relevant, accurate documentation is produced, and information is verified against the principal’s instructions.</td>
</tr>
<tr>
<td></td>
<td>1.4 Marketing strategy is reviewed and adjusted in consultation with the principal to enable agency services to be provided with the continued, informed consent of principals.</td>
</tr>
<tr>
<td>2. Promote and advertise property.</td>
<td>2.1 Advertising copy is produced which meets agreed budget and reflects agreed property and agency marketing strategies.</td>
</tr>
<tr>
<td></td>
<td>2.2 Maximum impact in the selected market is achieved by the placement of timely advertising and the development of appropriate promotional material.</td>
</tr>
<tr>
<td></td>
<td>2.3 Advertising copy and promotional material are reviewed for quality and effectiveness to enable appropriate adjustment to marketing strategies to be made.</td>
</tr>
</tbody>
</table>
Purpose of activity

Learners will learn how to advertise and promote a property that is for sale.

Underpinning knowledge and skills

- Property appraisal and building regulations, including zoning.
- Commercial property market conditions.
- Advertising and copywriting techniques for marketing a property.
- Real estate marketing and budgeting for a marketing campaign.
- Multimedia communication techniques.
- Vendor motivation.
- Agency policy and procedures.
- Copywriting and insertion of real estate advertisements.
- Literacy and numeracy, including computer literacy.
- Communication, including use of sales techniques.
- Office administration, business correspondence, including report writing.

Summary of activity

The learner is required to follow the 6 steps involved in marketing a property. Their task is to market 10 Ocean Glades Circle, Ocean Glades using all the resources that can be found in the Laptop, Briefcase and the second task page. The 6 steps are:

1. Create a marketing plan.
2. Recommend property improvements.
3. Adhere to advertising rules.
4. Advertise the property.
5. Record the results of marketing activities.
6. Communicate with the vendor.

Special features

The forms are in Word format in the forms section of the Briefcase. This allows the learner to either print them or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.

Part of the learners’ task is to watch a simulation of Rick carrying out marketing activities. This needs to be watched closely and the marketing activity log needs to be filled in simultaneously.

Challenge

Learners who do not carefully observe Rick’s marketing activities will not pick up on every point that needs to be put into the marketing activity log.
Assessment suggestions

Learners could submit the documents they have filled in or created for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used. You may choose to ask learners to present their marketing activity log to each other (or to you) to enable assessment of their skills in this area.

Alternative approaches and suggested collaboration activities

The following information relates to the six steps in the Market Property Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th>Step 1: Create a marketing plan.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires learners to create a marketing plan for a specific property using the marketing plan form in the forms section of the Briefcase.</td>
</tr>
<tr>
<td>Learners could post their marketing plans to the discussion board and receive feedback from other learners.</td>
</tr>
<tr>
<td>You could post your own marketing plan on the discussion board and then generate a group discussion around this, requesting feedback.</td>
</tr>
<tr>
<td>Learners could research advertising costs in their own state for local/community and major papers and compare costs.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2: Recommend property improvements.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learners learn about making improvements to a property to increase its value and saleability. Learners inspect a property and recommend inexpensive improvements.</td>
</tr>
<tr>
<td>Learners could inspect their own or a friend’s house and make a list of improvements that would improve the saleability or value of the property. When learners have viewed the property they could post a summary of the suggested improvements to the discussion board. You could then facilitate a discussion around the most common changes that learners recommended, and use this to ensure that all the main features have been identified before learners progress to the next stage.</td>
</tr>
<tr>
<td>Learners could look on the WWW for websites about inexpensive property improvement ideas and tips.</td>
</tr>
<tr>
<td>You could post several internal and external pictures of a property to the discussion board and then ask for feedback on suggested improvements.</td>
</tr>
</tbody>
</table>
### Step 3:
**Adhere to advertising rules.**

*Rules that must be followed when writing advertisements and the implications of failing to follow them is covered here. Learners need to research the legislation in their State/Territory regarding advertising and take it into account when writing advertisements.*

Learners could research the legislation in their State/Territory regarding advertising. Information obtained from this could be posted to the discussion board.

### Step 4:
**Advertise the property.**

*Different ways of advertising property is covered. Learners create their own advertisements to market a property effectively.*

Learners could find advertisements and post these as an attachment to the discussion board or describe them. They should describe why these advertisements are effective or ineffective.

You could post a picture of a property to the discussion board, along with some of its features and ask learners to write their own advertisements and post these to the discussion board or send them to you.

Learners could nominate which advertising method they think is the most effective and why and post their thoughts on the discussion board.

Learners could log advertising in their suburb over a 2 – 4 week period and compare their findings using the discussion board.

If learners are creating advertisements for you as part of their task, you should advise the learners of the different formats you require them to be submitted in.

### Step 5:
**Record the results of marketing activities.**

*The way that marketing activity is recorded is covered. Learners should observe marketing activities and record their findings in the marketing activity log in the forms section of the Briefcase.*

Learners who are sponsored by an agency could spend time with an agent during a home open and fill in a marketing activity log during this time.
<table>
<thead>
<tr>
<th>Step 6:</th>
<th>Using the chat room and referring to the completed marketing activity log, learners could practise taking turns at being the real estate agent, explaining the results to the vendor and making suggestions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate with the vendor.</td>
<td>Learners could write a script, having referred to the completed marketing activity log, as a real estate agent explaining the results to the vendor.</td>
</tr>
<tr>
<td>Communication between the vendor and agent is shown here. Learners explain what they conclude from the marketing activity log and make recommendations to the vendor.</td>
<td></td>
</tr>
</tbody>
</table>

**Preparing learners for the resources**

If you choose to do discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this unit.

**Other related resources or activities**

The Conduct Property Sale by Auction Training Manual contains material on marketing auction properties, which may be helpful.

**Ways of customising the resources**

Forms could be replaced with ones from your State/Territory.

**Ways of promoting collaboration between learners**

The ways of advertising a property can be very diverse and learners can be very creative, so learners could share their advertising ideas with fellow learners. Learners could give feedback to each other on the advertisements they have written.

**Customising the product for different audiences**

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
## Conduct Property Sale by Auction (Sales stream)

Unit of competence covered:

**PRDRE26A – Conduct Property Sale by Auction**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prepare for auction sale.</td>
<td>1.1 Auction marketing procedures, which may include prepayment of promotion, advertising costs and related administrative expenses, location and auction day procedures, are agreed in advance with vendor.</td>
</tr>
<tr>
<td></td>
<td>1.2 Auction documentation which is consistent with vendor’s instructions and marketing plan is used to manage the auction program.</td>
</tr>
<tr>
<td></td>
<td>1.3 Appropriate and reliable descriptions of the subject property are provided before and during the auction.</td>
</tr>
<tr>
<td>2. Conduct auction.</td>
<td>2.1 Questions asked by interested parties are answered or referred to informed sources.</td>
</tr>
<tr>
<td></td>
<td>2.2 The auction is professionally conducted to establish the optimum price possible from the buyers in attendance, consistent with the auction strategy.</td>
</tr>
<tr>
<td></td>
<td>2.3 The auction is conducted in a manner consistent with the agency marketing strategy and property sales legislation.</td>
</tr>
<tr>
<td>3. Complete auction sale.</td>
<td>3.1 Accurate sales data is compiled which reflects auction outcomes and can be used in follow-up procedures.</td>
</tr>
<tr>
<td></td>
<td>3.2 Appropriate records of attendance or interest are compiled to expand agency contact lists of potential clients identified through the auction process.</td>
</tr>
</tbody>
</table>
Purpose of activity

Learners will learn how to prepare, conduct and complete the sale of a property by auction.

Underpinning knowledge and skills

- Auction and property sales consulting techniques.
- Real estate advertising.
- Sales marketing and presentation.
- Legislation affecting property selling, including public liability, trade practices, fair trading, and agency and occupational licensing requirements.
- Group communication techniques, including voice projection and dramatic presentation.
- Voice control.
- Costing and pricing in relation to conducting a property sale by auction.
- Selling.
- Work planning and management.
- Use of information technologies.

Summary of activity

The learner is required to follow the 7 steps involved in selling a property by auction. Their task is to sell 10 Ocean Glades Circle by auction, using the resources that can be found in the Laptop, Briefcase and the task page. The 7 steps are:

1. Establish whether to auction a property
2. Listing a property for auction
3. Market the property
4. Conduct home opens
5. Prepare for auction day
6. The auction is conducted
7. Complete the auction sale

Special features

The forms that the learner will use are available in Word format in the forms section of the Briefcase. This allows the learner to either print out the forms for completion or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.
Part of the learners’ task is to monitor the marketing activities that lead up to the auction in the ‘Follow the leader’ simulation of Michael Scott’s marketing activities prior to auction. This needs to be watched closely and the marketing activity log needs to be filled in simultaneously.

An example of what the completed Marketing Activity Log should include is shown below. This includes all the observations the learner should make while watching the ‘Follow the leader’ simulation.

<table>
<thead>
<tr>
<th>Week</th>
<th>Details of advertising</th>
<th>Cost of advertising</th>
<th>Number of phone enquiries for week</th>
<th>Number of people through home open</th>
<th>Comments/follow up</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Standard lineage advertisement in Saturday newspaper</td>
<td>$190</td>
<td>3</td>
<td>6</td>
<td>One couple said they would definitely bid at auction. Married couple Agnes and Jack seemed interested but were concerned about the price they may come back. Samantha McCarthy not interested in the property but interested in townhouses we have on the books. Call her with details A potential pre-auction bid from neighbours but suspect this won’t eventuate. Some people expressed concerns about the size of the property and décor. Other people positive about light and space. John Hamilton interested in buying the property as an investment. Private viewing this week. Will follow up all parties during the week.</td>
</tr>
<tr>
<td></td>
<td>Standard lineage advertisement in weekday newspaper</td>
<td>$100</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>¼ page in Homeowner magazine</td>
<td>$190</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Internet advertisement</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Standard lineage advertisement in Saturday newspaper</td>
<td>$190</td>
<td>3</td>
<td>12</td>
<td>Woman interested in subdividing. Explained about zoning laws. Young couple looking to buy a less expensive property around $200,000. Have offered to show them suitable houses so must make follow up phone call.</td>
</tr>
<tr>
<td></td>
<td>Internet advertisement</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
One party commented that the house was lovely and light.

Ann interested in bidding but wants to sell her Jardine property first. Have made an appointment to view her property as may have clients who are interested in it.

Potential buyer Bill wants me to arrange white ant inspection. Have called company who will inspect the property tomorrow and send report to Bill.

Janice Brownfrey has arranged to inspect the property tomorrow.

|   | Standard lineage advertisement in Saturday newspaper | $190 | 9   | 1   | One man seemed interested and asked me what the vendor expected to sell the property for. Of course I couldn’t tell him but he said he’d come along to the auction on the day. Neighbours came by to see what the property was worth and have a look. Woman quite liked the property but more interested in Federation houses.
|   | Standard lineage advertisement in weekday newspaper | $100 | 2   | 2   | Agnes and Jack who looked at the property a couple of weeks ago called me and indicated their parents would contribute to buying. So it looks like they may put in an offer on auction day.
|   | Internet advertisement | NA |      |      | Had a phone request from Mr William Browning for a private viewing of the property.
| 3 |   | $190 | 9   | 1   | Interested couple requested paperwork and some information about what other properties had recently sold for in the area.
| 4 | Standard lineage advertisement in Saturday newspaper | $190 | 13  | 3   | A property developer was interested in buying the house so he could demolish and develop. Told him zoning laws prevented that with this particular property but would call him with suitable development opportunities.
|   | Internet advertisement | NA |      |      |
Felix Grange not interested in house but interested in low maintenance townhouse. Must call with suitable properties.

A few phone calls to find out more about the property and make appointments to see it. Elizabeth and Georgina (mother and daughter) to view the property next Wednesday.

| 5 | Standard lineage advertisement in Saturday newspaper | $190 | 11 | 3 |
|   | Internet advertisement | NA |

A couple of people were interested in how long the property had been on the market, what similar properties nearby had sold for etc. General interest not specific.

Email photos of the property to roger@omnicom.com. He is overseas but his wife thinks he’ll be interested in the house and wants him to see pics.

Phone call from Marcus requesting a similar but slightly smaller property – showing him Breeze Crescent.

Phone call from Leroy who wants a property with four (!) bathrooms.

| 6 | Standard lineage advertisement in Saturday newspaper | $190 | 6 |
|   | Standard lineage advertisement in weekday newspaper | $100 | 3 |
|   | ¼ page in Homeowner magazine | $190 | 6 |
|   | Internet advertisement | NA |

General interest in the property but no specific leads. People interested in what similar properties in the area have recently sold for.

Phone calls with general queries about council and water rates etc.
Challenge

Learners who do not carefully watch the ‘Follow the leader’ simulation may miss important information that needs to be noted on their marketing activity log. Learners who don’t access all the resources available to them may have difficulty filling in the documentation.

Assessment suggestions

Learners could submit all the documents they have created for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used.

Alternative approaches and suggested collaboration activities

The following information relates to the seven steps in the Conduct Property Sale by Auction Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th>Step 1: Establish whether to auction a property.</th>
<th>Learners could examine either their own property or a friend’s and determine whether it should be sold by auction or not and substantiate their choice with reasons. They could post their thoughts on the discussion board or e-mail it to you.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learners identify the advantages and disadvantages of selling a property by auction. Learners complete an exercise where they establish whether to sell a property by private treaty or auction.</td>
<td>Learners could research the purchaser response to auctions in their State/Territory and obtain statistics on the success or failure. Learners could research the success of auctions in their suburb and find reasons for this. This information could be posted on the discussion board and discussion generated about this.</td>
</tr>
<tr>
<td>Learners already sponsored by an agency could speak to agents about how they decide whether to auction a property. Details could then be posted to the discussion board.</td>
<td>Learners could post pictures and/or descriptions of properties to the discussion board and other learners could state whether they would auction the property or not and give reasons.</td>
</tr>
<tr>
<td>Step 2: Listing a property for auction.</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Learners fill in an auction authority form when they list a property for auction. The role and characteristics of an auctioneer is also covered.</td>
<td></td>
</tr>
<tr>
<td>Learners could create a checklist of characteristics that a good auctioneer should have.</td>
<td></td>
</tr>
<tr>
<td>If learners have been to an auction previously, they could discuss the auctioneer and their qualities with other learners on the discussion board.</td>
<td></td>
</tr>
<tr>
<td>Learners could find the authority to auction documentation in their state.</td>
<td></td>
</tr>
<tr>
<td>Learners could find the legislation that governs auctioneers in their State/Territory.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3: Market the property.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learners learn about marketing plans and the market activities used when selling a property by auction.</td>
</tr>
<tr>
<td>Learners could research advertising costs in their own State/Territory for local/community and major papers and compare costs.</td>
</tr>
<tr>
<td>Learners could think up some creative marketing ideas and share them using the discussion board.</td>
</tr>
<tr>
<td>Learners could be allocated a property such as one of those contained in the map and they could create a marketing plan for auction for it. The properties contained in the map that aren’t included in the task are: 8 Tappa Crescent Blue Ridge, 6 Batavia Place Sea View and 23 Barran Street Kaluka.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 4: Conduct home opens.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learners learn how to identify interested purchasers at home opens and they fill in a marketing activity log to record the results of marketing activities.</td>
</tr>
<tr>
<td>If the learner is already sponsored by an agency, they could attend a home open and fill in the marketing activity log in response to this.</td>
</tr>
<tr>
<td>Using chat, learners could practise speaking to potential purchasers at home opens. They should try to focus the conversation on identifying whether the person is a genuine purchaser.</td>
</tr>
<tr>
<td>Learners could write a script that contains dialogue between a real estate agent and a potential purchaser. The agent should be trying to identify whether the person is a genuine purchaser.</td>
</tr>
</tbody>
</table>
Step 5:
Prepare for auction day.
Learners are presented with all the duties they need to carry out on auction day and they are given an example of a checklist of things to do. On site and off site auctions are covered, with the advantages of each.

Learners could think of interesting ideas to improve auction day and post their ideas on the discussion board.

Step 6:
The auction is conducted.
The auction process is explored and learners can watch an auction.

Learners could be broken into groups and have a virtual auction using either the chat room or the discussion board.

Learners could search the WWW to find websites that contain video footage of auctions. Helpful URLs could be posted to the discussion board.

Look for the documentation that is filled in when a property is auctioned in your State/Territory.

Learners could attend an auction in their suburb and discuss it with other learners using the discussion board.

Step 7:
Complete the auction sale.
Learners can look at a completed contract for sale for auction. The procedures that should be carried out if the property sells are presented as well as steps to take if the property fails to sell at auction.

On the discussion board, learners could discuss why properties don’t sell at auction.

Learners could create a checklist of the processes that should be carried out if a property is sold at auction and a checklist of processes that should be carried out if a property doesn’t sell at auction.

Preparing learners for the resources

If you choose to do discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.
Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

Other related resources or activities

The Market Property Training Manual contains helpful information on marketing a property, which could be helpful when marketing an auction property.

Ways of customising the resources

Properties could be replaced to suit the ones in your area. Forms could be replaced with those in your State/Territory.

Ways of promoting collaboration between learners

Auctioning a property requires a lot of interaction between the agent and potential purchasers. Learners can practise interacting with purchasers, using chat, and give feedback to each other.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Monitor Sales Process *(Sales stream)*

Unit of competence covered:

**Unit PRDRE16A – Monitor Sales Process**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| 1. Plan for property settlement. | 1.1 Settlement requirements are identified and checked with relevant parties to minimise misunderstanding or breaches of contract.  
1.2 Settlement within the contract’s legal framework is ensured by liaison with legal practitioners and other parties representing the vendor and buyer.  
1.3 Contingency plans are prepared in consultation with relevant legal agents to avoid the possibility of one or more parties to the transaction being unable to fulfil contractual obligations. |
| 2. Prepare documentation for agency disbursements. | 2.1 Settlement financial transactions are checked for accuracy against contractual documentation, and agency fees are calculated and safeguarded during disbursement activities.  
2.2 Authorised agency disbursements are obtained within contractual, agency and statutory requirements.  
2.3 Financial systems are updated to reflect authorised transactions.  
2.4 Agency fees are calculated and safeguarded during disbursement activities.  
2.5 Due and proper attention is paid to obtaining required authorisations, signatures and identifications prior to disbursement. |
Purpose of activity

Learners will gain an understanding of the procedures involved in monitoring the lodgement of documents for the correct transfer of ownership required for a legal sale of property.

Underpinning knowledge and skills

- Property sales settlement procedures.
- Administration, including database management and trust accounting in real estate.
- Agency procedures and customer service protocols.
- Principles of business law and relevant statutes affecting the sale of the subject property.
- Communication, including interpersonal and business correspondence.
- Use of information technologies in the preparation of documents.
- Quality assurance involved in monitoring the sales settlement process.
- Work planning and management.

Summary of activity

For this unit, the learner is asked to monitor the sales process for the sale of 6 Batavia Place, Sea View. The learner needs to use the information in the Contract of Sale to complete the Sales Information Form. A blank form can be found in the Forms section of the Briefcase. Learners need to list three examples of potential risks during the sales process for this property and the results of these and what could be done to avoid them. They also have to create a flow chart of the agent’s and settlement agent’s role in the disbursal of funds.

The 3 steps are:

1. Identify the settlement process.
2. Make contingency plans.
3. Disburse funds.

Special features

The forms that the learner will use are available in Word format in the forms section of the Briefcase. This allows the learner to either print out the forms for completion or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.

Challenge

Creating the flowchart of the roles of the settlement agent and the agent in the disbursal of funds may be quite difficult for learners and they may need assistance in doing this.
Assessment suggestions

Learners could submit their Sales Information forms and flow chart for assessment. They could also submit their examples of potential risks for marking.

Alternative approaches and suggested collaboration activities

The following information relates to the three steps in the Monitor Sales Process Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

You should also check all the URL’s used in this unit to ensure they are still valid.

<table>
<thead>
<tr>
<th>Step 1: Identify the settlement process.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covers the process from sale to settlement. How to fill in a Sales Information Form is covered and learners get to look at a completed Contract of Sale.</td>
</tr>
<tr>
<td>Learners could find the Contract of Sale that is used in their State/Territory.</td>
</tr>
<tr>
<td>Learners could check to see whether there is a cooling off period in your state for properties sold by private treaty.</td>
</tr>
<tr>
<td>Learners could research how the settlement process works in their State/Territory. Their findings could be posted to the discussion board.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2: Make contingency plans.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covers common problems that happen during settlement and the contingency plans that can be made to avoid it. Scenarios where this happens are presented and learners practise using contingency plans.</td>
</tr>
<tr>
<td>Learners could find out whether you need to disclose kickbacks to clients in their State/Territory.</td>
</tr>
<tr>
<td>Learners could research cases where there has been legal action over problems that have occurred during the settlement process.</td>
</tr>
<tr>
<td>Learners already in the workplace could speak with a conveyancing agent to learn more about their role in the settlement process.</td>
</tr>
<tr>
<td>Learners already in the workplace could speak to a real estate agent to find out what contingency plans they make to avoid problems in the settlement process.</td>
</tr>
</tbody>
</table>
They could write a script where they use contingency plans to avoid problems in the settlement process.

Learners could research how to write conditions into the contract correctly. They could also speak to solicitors and real estate agents regarding this topic. They could report their findings on the discussion board.

**Step 3:**

Disburse funds.

*In this section, the disbursement of funds at settlement and what the agent and conveyancing agent is responsible for is explored. The disbursements within the agency are covered and learners can calculate how each selling fee is distributed.*

Learners could write their own congratulatory letters to send to purchasers and vendors when they sell their property.

Learners could research cases where real estate agents have breached legislation in relation to the use of trust accounts and what the consequences were of this.

Learners already in the workplace could find out how the selling fee is disbursed within the agency.

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**Preparing learners for the resources**

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

**Other related resources or activities**

Many other units in the Sales Stream relate to the areas covered in this learning unit. You may like to encourage learners to explore the other Training Manuals available in the Virtual Realty Training Room.
Ways of customising the resources

As outlined in the suggested activities previously, you will need to add State/Territory specific information and resources for step 1.

Ways of promoting collaboration between learners

Learners could do their research in pairs and share the information with each other.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Obtain Property Listings (Sales stream)

Unit of competence covered:

**Unit PRDRE13A – Obtain Property Listings**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| 1. Establish and monitor client motivation and expectations of the agency. | 1.1 Client expectations of the agency and the market are clarified to the satisfaction of all relevant parties and accurately confirmed in writing.  
1.2 Clients are educated as to market influences affecting returns of property sales and rentals by provision of reliable information on market trends affecting the subject property. |
| 2. Deliver property listing presentations. | 2.1 Prospective clients’ motivation for listing the subject property is established.  
2.2 Information obtained from a visual inspection of the subject property is used to provide prospective clients with a realistic range of marketing options.  
2.3 Prospective client expectations of the agency and the market are clarified and documented for future reference.  
2.4 Market influences likely to affect the subject property listing, through the provision of reliable information on market trends, are conveyed to prospective clients and reflected in client instructions to act. |
3. **Provide advice on available options**

   | 3.1 Reliable and valid information is obtained from visual property inspection to provide clients with a realistic range of marketing options. |
   | 3.2 Client’s questions are used to clarify the available risks and options involved before entering into an agreement as to the terms and conditions of sale/rent. |
   | 3.3 Client expectations are confirmed in writing to avoid ambiguity and minimise misunderstanding regarding terms and conditions of agency service. |

4. **Provide property appraisals.**

   | 4.1 Appropriate market information is obtained and accurately analysed against market factors and known market trends. |
   | 4.2 Accurate property advice is formulated, and discussed and/or provided in writing to assist clients in making informed decisions. |
   | 4.3 Relevant property records are accurately maintained and updated to enhance property appraisals and listing processes for future clients. |

5. **Secure property marketing listing.**

   | 5.1 Relevant parties are informed of the property listing. |
   | 5.2 Listing documentation is completed to reflect agency, client and statutory requirements. |

6. **Negotiate fees and conditions with lessors.**

   | 6.1 Agency fee guidelines and structures are explained to vendors/landlords and any questions clarified and, where possible, concerns addressed. |
   | 6.2 Fees and conditions are negotiated and established with vendors/landlords within agency guidelines. |
7. Record and act on instructions.

7.1 Client instructions are recorded to meet sales/aucioneering legislative requirements and agency record-keeping requirements.

7.2 Marketing plans for the subject properties are developed to reflect negotiated agreement.

7.3 Business documents are produced to reflect advice to relevant parties involved in the listing transaction.

7.4 Information to clients is provided to reflect progress made within the terms of the agreement.

Purpose of activity

Learners will gain an understanding of the relationship and interactions between agency staff and clients which leads to a successful listing of property for sale or management.

Underpinning knowledge and skills

- Zoning and other regulations affecting property usage.
- Market trends in relation to obtaining property listings.
- Marketing practices in relation to obtaining property listings.
- Types of property and investment opportunities.
- Financial constraints attached to each type of property.
- Legal and contractual environment.
- Agency listing practices and industry codes of practice.
- Statutory and common law duty of care.
- Planning and organising work, including time management and problem solving.
- Property appraisals.
- Communication skills: interpersonal, negotiation and group.
- Information management.
- Preparation of listing contracts.
- Use of real estate advertising and marketing techniques.
- Use of word processors and electronic databases.

Summary of activity

For this unit, the learner is asked to obtain the property listing for 8 Tappa Crescent, Blue Ridge. The learner needs to appraise the property using the resources in their Briefcase and Laptop, such as the map, forms, REIBS and Blue Sky City Council websites. They need to name the motivations of the vendor and the marketing activities they would use.
Learners need to identify the expectations the potential vendor has of the agency and create a listing kit. They are required to create a marketing plan using the form in the Forms section of the Briefcase and give advice to vendors on selling their property. They need to explain the fee structure to the vendor, fill in the listing authority and then create a letter to send to the vendor to confirm the listing of the property.

The 6 steps are:

1. Conduct a property appraisal.
2. Establish client motive and their expectations of the agency.
3. Deliver a listing presentation.
4. Provide advice on options.
5. Negotiate fees and conditions.
6. Complete documentation and act on instructions.

Answers to task

These are possible answers:

The dialogue seems to suggest that the following are the motivations of the potential vendors for selling the property:

- They are moving overseas.
- Need the money to finance their move overseas.

The marketing techniques that you would use considering their motivations:

- A strong marketing campaign with several home opens a week in order to sell the property as quickly as possible because they are leaving in six weeks.
- Advertisements in the midweek and weekend newspapers, local newspapers and Homeowner magazine. Picture of the property included in the advertisement to attract attention.
- Internet advertisement.
- Photographic For Sale sign.

Advice that you would give to the potential vendors about selling their property:

- Remove clutter from the house.
- Clean up the garden.
- Clean up the house thoroughly.
Marketing the property:

- Assist them in developing a strong marketing plan that fits their budget.
- Explain each of marketing options and advise them of methods that would suit their property and circumstances.

Special features

The forms that the learner will use are available in Word format in the forms section of the Briefcase. This allows the learner to either print out the forms for completion or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.

Challenge

The task is quite lengthy and it may challenge the learner because it requires that they create some of their own resources such as a listing kit. Providing examples of these may assist the learner in creating one of their own.

Assessment suggestions

Learners could submit their property appraisal report, listing kit, marketing plan, the letters they create, listing authority and other written documents for assessment. They could also be assessed on their discussion board postings and chat room conversations if these are used.

Alternative approaches and suggested collaboration activities

The following information relates to the six steps of the Obtain Property Listings Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

You should also check all the URL’s used in this unit to ensure they are still valid.
### Step 1: Conduct a property appraisal.

*This covers how a property appraisal is carried out and the resources that are used to do it.*

Learners could appraise their own property or a friend’s using the local paper or websites to conduct a comparative analysis.

Learners already in the workplace could accompany an agent to a property appraisal and see the processes involved. Any interesting or helpful findings could be posted on the discussion board.

Learners could role play the presentation of the report using the chat room.

Learners could find suitable websites in their State/Territory that they could use when conducting a comparative market analysis.

You could replace the forms used when conducting a property appraisal with those that are used in your State/Territory.

### Step 2: Establish client motive and their expectations of the agency.

*Covers how you can establish the motivations of the potential vendors for selling their property and their expectations of you and the agency. Learners can practise establishing client motivations and expectations and look at FAQs often asked by potential vendors.*

Learners could roleplay questioning a potential purchaser to establish their motivations for purchasing and the expectations they have of the agent and the agency using the chat room.

Learners could speak to their friends and ask them what their expectations would be of a real estate agent who was selling their property. This could be carried out using a questionnaire, which the learner could create.

Add more FAQs that you think a potential vendor may ask to the discussion board and other learners could reply with suggested responses to these questions.

### Step 3: Deliver a listing presentation.

*In this section the listing presentation and the listing kit used to do the presentation is explored.*

Learners could practise carrying out a listing presentation with other learners using the chat room.

Learners could find statistics that they think vendors may want to see during the listing presentation and post these on the discussion board.
<table>
<thead>
<tr>
<th>Step 4: Provide advice on options.</th>
<th>Learners could put together their own listing kit using the resources in REIBS and other materials they have created or found on the Internet.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 4: Provide advice on options.</td>
<td>Learners could go to a friend’s property and give them advice on improving the property to increase the chance of sale. The advice given could be posted on the discussion board.</td>
</tr>
<tr>
<td>Step 4: Provide advice on options.</td>
<td>You could post some photos of a property to the discussion board and ask learners to post advice on improving the property.</td>
</tr>
<tr>
<td>Step 4: Provide advice on options.</td>
<td>Learners could list all the different marketing options available and how and when they are useful in marketing a property.</td>
</tr>
<tr>
<td>Step 4: Provide advice on options.</td>
<td>Learners could roleplay in the chat room, giving advice to a potential vendor.</td>
</tr>
<tr>
<td>Step 4: Provide advice on options.</td>
<td>Learners could explore the marketing options available in their area and the costs associated with these.</td>
</tr>
<tr>
<td>Step 5: Negotiate fees and conditions.</td>
<td>Learners already in the workplace could find out the fee structure at their agency.</td>
</tr>
<tr>
<td>Step 5: Negotiate fees and conditions.</td>
<td>Learners could practise negotiating fees and conditions with others in the chat room.</td>
</tr>
<tr>
<td>Step 5: Negotiate fees and conditions.</td>
<td>Ask learners to look at the listing agreement conditions that appear on the listing documentation in their State/Territory.</td>
</tr>
<tr>
<td>Step 6: Complete documentation and act on instructions.</td>
<td>Learners could source the listing documents that are required in their State/Territory.</td>
</tr>
<tr>
<td>Step 6: Complete documentation and act on instructions.</td>
<td>Learners could research how often exclusive authority is used, compared to non-exclusive authority in their State/Territory.</td>
</tr>
<tr>
<td>Step 6: Complete documentation and act on instructions.</td>
<td>Learners could create their own letter to vendor, which is sent when they’ve just listed a property.</td>
</tr>
</tbody>
</table>
Preparing learners for the resources

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

Other related resources or activities

Step one summarises what they would have learnt if they have completed the Property Appraisal unit. So if they require more information about this you could direct them to work through that unit. Step four partly covers marketing, so you could direct learners to work through the Market Property Training Manual if they require more information.

Ways of customising the resources

You could replace documents with those used in your State/Territory.

Ways of promoting collaboration between learners

Learners could do their research in pairs and share the information with each other.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
## Undertake Property Sale by Private Treaty (Sales stream)

Unit of competence covered:

**Unit PRDRE15A – Undertake Property Sale by Private Treaty**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| 1. Screen buyer enquiries. | 1.1 Enquiries from potential buyers are screened to enable buyer preferences and financial limits and capacity to buy to be ascertained  
1.2 Factors likely to influence the purchase of properties are identified and used to confirm the buyer's intentions  
1.3 Discussions with potential buyers are enhanced by the use of marketing aids to identify and match stated requirements with known listings  
1.4 Potential buyers are assisted in making a decision to view properties using information obtained from buyers and vendors |
| 2. Undertake property inspection. | 2.1 Inspections are arranged to suit all parties  
2.2 Promotional material on the subject property is produced to describe salient sales features  
2.3 Effective questioning techniques are used to clarify buyer expectations in relation to key features of the property on display |
<p>| 3. Provide advice on available options. | 3.1 Factors affecting the successful conclusion of the sale are identified and addressed in the formulation of a sales strategy |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2</td>
<td>Key decision-makers are identified to ensure that their needs and concerns are met in the presentation of properties</td>
</tr>
<tr>
<td>3.3</td>
<td>Appointments are made and properties presented according to the code of conduct defined in the agency customer service policy</td>
</tr>
<tr>
<td>3.4</td>
<td>Salient features of selected properties are matched to buyers’ stated needs and motivations</td>
</tr>
<tr>
<td>3.5</td>
<td>Buyers are encouraged to clarify key aspects of the asset under consideration before a decision is made to purchase the property</td>
</tr>
<tr>
<td>3.6</td>
<td>Qualified prospects are recorded to provide an opportunity to maximise future marketing activities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.</th>
<th>Decide on future contacts with prospects.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>The nature of future contacts with prospects is assessed in the light of likely agency: client interaction to a given point in time</td>
</tr>
<tr>
<td>4.2</td>
<td>Business correspondence records are held on file to provide justification for the continuation or termination of contact, and are communicated, without prejudice, to the parties involved</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.</th>
<th>Maintain communication with vendor.</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Vendor confidence in agency marketing activities is maintained through ongoing contact and correspondence</td>
</tr>
<tr>
<td>5.2</td>
<td>Communication is diarised to provide an accurate and objective record of progress reports to client</td>
</tr>
<tr>
<td>6.</td>
<td>Submit offers and negotiate property sales.</td>
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</table>

| 7. | Maintain client relationships. | 7.1 | Future business relations are established by mutual evaluation of vendors' and buyers' satisfaction with services provided |
|    |                               | 7.2 | Business records and databases are updated to facilitate networking and informed marketing strategy planning |

**Purpose of activity**

Learners will gain an understanding of how to sell a property using general real estate sales procedures and techniques.
Underpinning knowledge and skills

- Principles of property marketing.
- Types of property and investment opportunities.
- Property finance.
- Business law and the law of contracts affecting property.
- Business ethics and administration.
- Regulations affecting the sale of the property.
- Planning and organising work, including time management.
- Selling skills in relation to sale by private treaty.
- Communication, including literacy, numeracy, negotiation and interpersonal communication techniques.
- Administration of documentation process in relation to sale by private treaty.
- Applied research, particularly of titles, local authority planning, sources of finance and purchase/sale costs.

Summary of activity

In this activity, learners are required to outline the preparations needed before a home open and what they would do during a home open. They need to list questions they would use to screen potential buyers and fill in a Purchaser Needs Analysis in response to their conversation with a potential purchaser, using a blank form in the Forms section of their Briefcase. They need to identify common ‘buyer needs’ that would be fulfilled by purchasing a property and how they would encourage a potential purchaser to buy a property. They need to recognise common objections to purchasing a property and how to negotiate with a potential purchaser. Learners will identify the purchaser’s and vendor’s obligations once the offer is accepted.

The 5 steps are:

- Arrange property viewings.
- Qualify buyers.
- Overcome objections.
- Negotiate the terms of offer.
- Present offer and negotiate.

Special features

The forms that the learner will use are available in Word format in the forms section of the Briefcase. This allows the learner to either print out the forms for completion or to fill them in online. The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.
Challenge

This is a very large task and it requires that the learner do a lot of small things. Make sure that the learner completes all the different things that are required of the task.

Assessment suggestions

Learners could submit their purchaser needs analysis and other written documents for assessment. They could also be assessed on their discussion board postings and chat room conversations if these are used.

Alternative approaches and suggested collaboration activities

The following information relates to the five steps of the Private Treaty Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

You should also check all the URL’s used in this unit to ensure they are still valid.

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>Learners could practise showing their friends around their own property.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrange property viewings.</td>
<td>Learners already in the workplace could fill in the marketing activity log for the real estate agent during a home open.</td>
</tr>
<tr>
<td></td>
<td>Learners could collect home open brochures from several home opens and compare them.</td>
</tr>
<tr>
<td></td>
<td><strong>This covers how property viewings are carried out and the advertising brochures that are used. The purpose of the marketing plan and the marketing activity log is also explored.</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2:</th>
<th>Learners could practise screening potential buyers using the chat room.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualify buyers.</td>
<td>Learners could record the purchasing needs of their friends in a purchaser needs analysis form.</td>
</tr>
<tr>
<td></td>
<td>Learners could list techniques they would use to motivate procrastinating buyers and post these on the discussion board.</td>
</tr>
<tr>
<td></td>
<td><strong>This explores how potential purchasers need to be screened in order to determine their motivations. Potential buyers details are recorded on a Purchaser Needs Analysis.</strong></td>
</tr>
<tr>
<td><strong>Step 3:</strong></td>
<td><strong>Step 4:</strong></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>Overcome objections.</strong>&lt;br&gt;&lt;br&gt;<em>This covers how buyer objections can be overcome. The tactful way of communicating these objections with the vendor is also explored.</em></td>
<td><strong>Negotiate the terms of offer.</strong>&lt;br&gt;&lt;br&gt;<em>This explores how a potential purchaser should be educated and negotiated with when making an offer.</em></td>
</tr>
<tr>
<td>Learners could write a story about a reluctant buyer and the techniques they used to overcome their objections. Learners already in the workplace could write about an experience they have had, or have heard about, where the objections of a vendor have been overcome. This could be posted on the discussion board.</td>
<td>Learners could roleplay educating a potential purchaser before they make an offer on a property using the chat room. Learners could roleplay negotiating the terms of an offer with a purchaser using the chat room. Learners could list special conditions that may be put in an offer and post this on the discussion board. Learners already in the workplace could observe an agent negotiating the terms of offer with a potential purchaser.</td>
</tr>
</tbody>
</table>
Preparing learners for the resources

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

Other related resources or activities

Step five mentions the obligations of the vendor and purchaser in the sale to settlement process and this is covered further in the unit Monitor sales process. Learners could be directed to look at this if they need more information on this area.

Ways of customising the resources

You could replace documents with those used in your State/Territory.

Ways of promoting collaboration between learners

Learners could do their research in pairs and share the information with each other.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Prepare and Execute Documentation (Sales stream)

Unit of competence covered:

Unit PRDRE39A – Prepare and Execute Documentation

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prepare documentation.</td>
<td>1.1 Parties, property and all relevant terms agreed to by the parties are described</td>
</tr>
<tr>
<td></td>
<td>1.2 Legal and government requirements are fulfilled in the correct manner</td>
</tr>
<tr>
<td></td>
<td>1.3 Documentation is completed accurately</td>
</tr>
<tr>
<td></td>
<td>1.4 Documentation is prepared within required timeframe</td>
</tr>
<tr>
<td>2. Present documentation for execution.</td>
<td>2.1 Advice given to the client is accurate and complete</td>
</tr>
<tr>
<td></td>
<td>2.2 Client is advised of rights, obligations and responsibilities ensuing from the legal relationship</td>
</tr>
<tr>
<td></td>
<td>2.3 Document is signed and witnessed in accordance with legal requirements and is properly executed</td>
</tr>
<tr>
<td></td>
<td>2.4 Document is certified if necessary</td>
</tr>
<tr>
<td></td>
<td>2.5 All relevant processes and searches are completed</td>
</tr>
<tr>
<td></td>
<td>2.6 Documentation is checked to ensure it is completed accurately and in accordance with procedures within the required timeframe</td>
</tr>
</tbody>
</table>
### 3. Manage collateral/third party involvement.

| 3.1 | Execution and return of documentation by other parties is arranged |
| 3.2 | Execution by third parties is checked to ensure compliance with legislative constraints |
| 3.3 | Completion of actions by other parties is checked to ensure timelines are met |

### 4. Draft, adapt and construct documents to meet client needs and instructions.

| 4.1 | Document purpose is identified |
| 4.2 | Document is designed to conform to all formatting requirements |
| 4.3 | Documentation is drafted or adapted to meet client needs |
| 4.4 | Document is produced which achieves intended purpose |
| 4.5 | Content information is checked to ensure it is clear, accurate and unequivocal |
| 4.6 | Completed document is checked for consistency with purpose and legislative requirements |

### Purpose of activity

Learners will gain an understanding of how to manage the process of settlement following a property sale.
Underpinning knowledge and skills

- Relevant legislation and common law
- Land Titles Office requirements
- Fiduciary duties and responsibilities relating to document preparation ethics
- Examination of documents and legislation
- Liaison/consultation with others in relation to preparing and executing documentation
- Presenting information in a variety of forms
- Planning and organising work
- Operating appropriate technology
- Drafting documents
- Time management
- Record-keeping and file maintenance

Summary of activity

In this activity, learners are required to provide a flowchart that shows the process they would take to manage the settlement of the subject property at 15 Mulligan Mews, Avonsleigh, for the buyer and develop a detailed checklist to ensure all tasks are met. They are asked to highlight those specific tasks that are governed by legislation or laws within their own State/Territory.

The 5 steps are:

1. Prepare documentation.
2. Complete documentation accurately and within required timeframes.
3. Give accurate and complete advice to clients.
4. Liaising with third parties during settlement.
5. Creating and utilising documentation for settlement.

Special features

The forms that the learner will use are available in Word format in the forms section of the Briefcase. This allows the learner to either print out the forms for completion or to fill them in online. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.
Challenge

This is a fairly straightforward task, following a defined process for settlement. If you wish to add more complexity and/or challenge to the task, you could throw in some “red herrings” such as the pest inspectors finding termites at the property, or a similar scenario, to encourage learners to explore the process of settlement and its potential pitfalls further.

Assessment suggestions

Learners could submit their flowchart, checklist and other written documents for assessment. They could also be assessed on their discussion board postings and chat room conversations if these are used.

Alternative approaches and suggested collaboration activities

The following information relates to the five steps of the Prepare and Execute Documentation Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

You should also check all the URL’s used in this unit to ensure they are still valid.

<table>
<thead>
<tr>
<th><strong>Step 1:</strong> Prepare documentation.</th>
<th>An example of a completed Contract of Sale is provided, however you may wish to replace this with a genuine CofS, or ask learners to find one from their own State/Territory and discuss what (if any) differences it has to the example provided.</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>In this first step, the various kinds of documentation required during the settlement process are explained.</em></td>
<td>Conditions affecting settlement are discussed here. You could play a quick game via the discussion board where you split the group into 2 – one has to come up with a list of conditions and the other has to offer solutions.</td>
</tr>
<tr>
<td>An example of a completed Owner’s Disclosure Statement is provided, however you may wish to replace this with a genuine ODS, or ask learners to find one from their own State/Territory and discuss what (if any) differences it has to the example provided.</td>
<td>An example of a completed Transfer of Land document is provided, however you may wish to replace this with a genuine TOL, or ask learners to find one from their own State/Territory and</td>
</tr>
</tbody>
</table>
**Step 2:**
Complete documentation accurately and within required timeframes.

*This step looks at the documentation required for both the buyer and the vendor, and the timeframes in which they are required to be completed.*

Rick provides examples of a buyer checklist and a vendor checklist that he uses to keep track of the documentation involved in the settlement process. These are provided as examples to support the main task that the learners have to complete for this unit.

To add some interest to this step, you could initiate a discussion on the Bulletin Board whereby you introduce complications or issues to the process and ask learners to decide how (or if) the documentation would need to be changed, and what impact this would have on the timelines.

**Step 3:**
Give accurate and complete advice to clients.

*Covered here are all the main elements of the settlement process, and information to help the learners give accurate and complete advice on the process to their clients.*

You may need to add/delete/change some of this information according to the legislation in the State/Territory where learners are working.

You could set up a roleplay activity using either a chat or discussion forum where learners take on the role of a seller/buyer and an agent and answer various questions relating to the settlement process to test their knowledge and understanding.

**Step 4:**
Liaising with third parties during settlement.

*This step introduces third party persons that may need to be consulted during the settlement process.*

This step contains fairly generic information, so you may wish to conduct an exercise whereby learners have to identify the third parties in their own State/Territory (for example; council offices and water authority) and put together a checklist of contact numbers/details etc to assist them with this step of the process in their own workplace.

**Step 5:**
Creating and utilising documentation for settlement.

*Explains the legal requirements of documentation used for settlement.*

To add more detail to this step, you could introduce a few scenarios that require the documentation used in a settlement to be changed, and facilitate discussion on how learners would handle them.

You could also ask learners to source documents used in settlement from their own workplace and facilitate a discussion on the differences.
Preparing learners for the resources

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

Other related resources or activities

This unit is closely related to PRDRE16A – Monitor Sales Process, and you may like to refer to this unit as revision and/or reinforcement of some elements of the steps in the process of preparing and executing documentation for settlement.

Ways of customising the resources

You could replace documents with those used in your State/Territory.

Ways of promoting collaboration between learners

Learners could do their research in pairs and share the information with each other.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Implement Personal Marketing Plan (Business Practices stream)

Unit of competence covered:

**PRDRE30A – Implement Personal Marketing Plan**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Maintain a professional image.</td>
<td>1.1 Dress code and personal grooming are maintained in accordance with agency requirements.</td>
</tr>
<tr>
<td></td>
<td>1.2 Work areas are kept tidy and uncluttered.</td>
</tr>
<tr>
<td>2. Address client requirements.</td>
<td>2.1 Client requirements are identified and understood.</td>
</tr>
<tr>
<td></td>
<td>2.2 Personal behaviour and interaction with clients is within the bounds of accepted professional ethics and community standards.</td>
</tr>
<tr>
<td>3. Build credibility with clients.</td>
<td>3.1 Client expectations for reliability, punctuality and appearances are addressed to the satisfaction of all parties.</td>
</tr>
<tr>
<td></td>
<td>3.2 Possible causes of client dissatisfaction are identified, dealt with, and recorded in accordance with agency procedures.</td>
</tr>
</tbody>
</table>

**Purpose of activity**

Learners will gain an understanding of the key areas involved in presenting a professional image to clients and colleagues and how they can contribute to success as a real estate agent.

**Underpinning knowledge and skills**

- Personal grooming and professional ethics.
- Customer service and verbal communication skills.
- Personal marketing strategies.
- Interpersonal communication skills,
- Time management and organisational skills.
Summary of activity

For this unit, the learner is asked to conduct a self-assessment activity to identify any areas of their personal marketing that require improvement. A self-evaluation form is provided in the forms section of the Briefcase. Following completion of the self-assessment, the learner is required to complete an ‘action plan’ that describes what strategies and resources they will use to facilitate these improvements.

The content of this unit does not cover ‘steps’ of a process like others, so in this case the Training Manual covers four key areas of personal marketing:

1. Maintaining a professional appearance.
2. Questioning and listening skills.
3. Communicating with clients.
4. Maintaining professional standards.

Special features

This unit has a lot of interactive learning exercises and includes a number of external websites. Virtual Realty’s ‘Customer Service Charter’ and ‘Company Charter’ are introduced as examples of professional standards. Learners are invited to take the ‘Virtual Realty Legal Eagle Quiz’ to test their knowledge of real estate legislation and professional standards. The REIBS website also has some articles that are relevant to this unit.

NOTE: the ‘Legal Eagle Quiz’ is also available as a stand-alone resource in the Training Room, under Puzzles.

The ‘Word’ documents are protected, however you can customise them by using the password ‘teacher’. You can alter the information on rollover within the PDF’s by using the ‘Forms’ tool inside Adobe Acrobat.

Challenge

This unit is fairly straightforward and may be seen as rather basic for learners with real estate experience or a professional background. If you encounter this, we recommend that you add challenge to the unit by instigating a lot of collaborative work such as discussions on pertinent topics. Suggestions are provided on the following pages.

Assessment suggestions

Learners could submit their self-evaluation and action plan to you for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used. The skills taught in this unit cross over with others (for example, communication skills is a competency found in several units) and learners may have already demonstrated their competency in these areas.
Alternative approaches and suggested collaboration activities

The following information relates to the four sections of the Implement Personal Marketing Plan Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

You may wish to replace the self-evaluation form provided with one of your own. You should also check all the URL’s used in this unit to ensure they are still valid.

| Step 1: Maintain a professional appearance. | An interesting discussion topic could be ‘should real estate agents wear a uniform?’ Opinions are generally divided on this issue and some interesting debate could be sparked. Century 21 with their ‘yellow jackets’ could be used as an example.

Covers personal appearance elements such as dress standards and professional appearance such as keeping a tidy office. Learners ‘dress’ Rick and Gail in appropriate business attire and help Tony Riccardo clean up his office.

You could set a task for learners to check out two agencies in their local area and report back on the dress standards of agencies and overall appearance of the agency office. |

| Step 2: Questioning and listening skills. | You could pose a challenge in the discussion forum; learners have to answer a riddle using only closed questions (to which you can answer only ‘yes’ or ‘no’) to gain clues.

Covers four questioning techniques and explains the importance of listening skills. Learners participate in several interactive scenarios on questioning skills. Ten top tips for effective listening are provided.

You could pose a challenge in the discussion forum; learners have to answer a riddle using only closed questions (to which you can answer only ‘yes’ or ‘no’) to gain clues.

For example; ‘A man rides up a mountain on Friday, spends three nights camping on the top then rides back down again on Friday. How?’ The answer is of course that the man’s horse is named Friday but it takes some clever questioning to arrive at this solution.

Another riddle that works well is; ‘In a cabin on the side of a mountain, 8 people are dead. What happened?’ The answer is that there was a plane crash into the mountain and the cabin is in fact an aeroplane cabin – however people automatically assume it’s a log cabin of some sort so it can be difficult for people to ask the right closed questions that will lead to the answer.

These are actually lateral thinking riddles to encourage people to ‘think outside of the square’, but they work very well in the context of questioning skills. You might want to save one for a later date when you are looking to add a bit of variety to the course. If this is a success, you could invite learners to submit their own riddles – you’ll be surprised how many of these exist! |
You could also set up an activity in which learners have to contact a real estate agency and ask for some information. An example could be; “what houses have you got for sale in xxxx suburb at the moment?”. They report back to the discussion board with details of the questions they were asked – how many closed/open/probing etc and how they felt about the questioning and listening skills of the person with whom they were speaking.

Learners could be asked to develop their own ‘top ten tips’ for questioning and listening, posting the list to the discussion board to share with others. Alternatively, ask learners to find a website on questioning and listening skills and submit the URL to the discussion forum for sharing with others.

An effective activity could be for learners to ‘script’ a conversation between an agent and a client that utilises all questioning techniques. This could be done in teams and results posted to the discussion board for comment.

**Step 3:**

**Communicating with clients.**

*In this section, learners listen to Blue Sky City residents talking about their real estate agents. The Virtual Realty ‘Customer Service Charter’ is introduced and the topic of customer satisfaction is explored.*

You could ask learners to source a ‘Customer Service Charter’ (or similar) from their own agency, or a local agency if they are not currently employed. Alternatively, you could provide this from your own sources. This could then be compared to the charter for Virtual Realty presented in the Toolbox, and you could facilitate a discussion on the differences.

Tell learners that they have just become owners of a real estate agency and their challenge is to develop a ‘Customer Service Charter’ that represents their service ethic. This activity would work well in small groups, with the developed charters being posted to the discussion board for comment.

Finally, you could ask learners to share their stories of customer dissatisfaction in the discussion forum, but be alert because this could easily stray off the topic you are trying to focus on. You could also invite discussion on the complaint shown on the dissatisfaction form.
Step 4:
Maintaining professional standards.

Legislative and regulatory issues are introduced and references are made to websites and documents for useful resources. Learners can do the ‘Virtual Realty Legal Eagle Quiz’ to check their understanding.

**NOTE:** much of the material in this section is covered in more detail in the unit ‘Manage Agency Risk’.

This step may require a lot of your input, as the content is not specific to any State/Territory. References are made to legislation and/or regulations that are consistent across Australia (for example, the privacy act), however the majority of this information will need to be provided from your own sources. Alternatively, send the learners on a ‘quest’ to find all the relevant documentation for Acts, legislation and regulations for the real estate industry in their own region – you might need to point them in the right direction to get started.

**NOTE:** we recommend that you check this section prior to delivery to ensure that the information presented is still accurate, as legislation may have changed since the Toolbox was developed in mid-2002.

A ‘Company Charter’ for Virtual Realty is introduced here. See step 3 of this section for suggested activities you could conduct along similar lines to the ‘Customer Service Charter’ activity suggestions.

A ‘REIBS Code of Conduct’ is also provided here – you could ask learners to compare this with the COC for their own region and facilitate an open discussion on its contents.

If you are also delivering the unit ‘Manage Agency Risk’, you will find more information on legislation and regulations in the Training Manual for that unit.

‘Legal Eagle Quiz’:

You could facilitate this quiz either by asking learners to submit their answers privately to you by email/fax or posting their answers to the discussion board for comparison with others.

Most of the questions are State/Territory specific, so you will need to prepare answers. Note that question 7 has two parts. The answers to questions 4, 5, 8, 10 and 12 are as follows:
**Question 4:** the three elements in page 6 of the summary.pdf document from the REIA website are:
- One party to a transaction suffered from a special disability or disadvantage, in dealing with the other party;
- The disability was sufficiently evident to the stronger party; and
- The stronger party took unfair or unconscionable advantage of its superior position or bargaining power to obtain a beneficial bargain.

**Question 5:** the two word answer is ‘reasonable grounds’.

**Question 8:** the answer is ‘false’.

**Question 10:** the answer is of course ‘No’. This could be an interesting topic for discussion – ‘what value is a code of conduct?’

**Question 12:** the REIA glossary shows 4 kinds; false or fraudulent misrepresentation, negligent misrepresentation, innocent misrepresentation and false representation.

You may choose to facilitate discussion on any of these issues, as industry legislation and regulations is not specifically covered in any unit of this course but is essential knowledge for new industry members.

### Preparing learners for the resources

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.
You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

**Other related resources or activities**

The unit **PRDRE10A ‘Manage Agency Risk’** has a large section on professional standards that includes legislation and industry guidelines. Manage Agency Risk unit is part of the Business Practices stream and can be accessed from the Diary, the Training Room or the stream index page.

**Ways of customising the resources**

As outlined in the suggested activities previously, you will need to add State/Territory specific information and resources for step 4.

**Ways of promoting collaboration between learners**

There is a lot of potential for interesting discussion on the points covered in this unit. In particular, step one ‘professional standards’ is likely to raise some debate over what individuals see as ‘appropriate’ since personal standards vary greatly. The suggested activities outlined previously for this unit would work well if structured in teams or pairs.

If you have a particularly cohesive group that doesn’t mind sharing, you could ask them to post their individual self-assessments and action plans (the task for this unit) to the discussion board for others to see.

**Customising the product for different audiences**

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
**Manage Agency Risk (Business Practices stream)**

Unit of competence covered:

**PRDRE10A – Manage Agency Risk**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Analyse potential risks to agency and clients.</td>
<td>1.1 Objectives of agency and client are confirmed by consultation with key personnel and reference to available information.</td>
</tr>
<tr>
<td></td>
<td>1.2 Likelihood of risk to objectives is assessed against an inventory of the current and planned agency/client assets, functions and existing risk management strategies.</td>
</tr>
<tr>
<td>2. Implement agency policies and procedures to minimise risk.</td>
<td>2.1 Causes of potential risk or existing threat to agency/client objectives are accurately identified.</td>
</tr>
<tr>
<td></td>
<td>2.2 Potential sources of risk or threat are thoroughly evaluated to establish extent of risk and correct procedures implemented to minimise risk in line with agency policy.</td>
</tr>
<tr>
<td>3. Establish ongoing monitoring and reporting systems to minimise risk to agency and clients.</td>
<td>3.1 Potential risks are determined by monitoring risk environment with consideration of agency/client role, location and market stability.</td>
</tr>
<tr>
<td></td>
<td>3.2 All potential risks/threats experienced by like organisations are assessed for relevance and the need to implement precautionary action.</td>
</tr>
<tr>
<td></td>
<td>3.3 All risk information is accurately recorded to enable frequency and extent of potential threats to be monitored and enable significant threats to be remedied according to agency policy.</td>
</tr>
</tbody>
</table>
4. Ensure security of managed properties.

4.1 Agency business objectives and asset security are maintained by establishing appropriate insurance arrangements.

4.2 All premium payments and claims are made in accordance with agency/client and insurance company requirements.

Purpose of activity

Learners will gain an understanding of the key areas involved in minimising the risk/s and/or threat/s to the success and business objectives of a real estate agency, their clients and colleagues.

Underpinning knowledge and skills

- Financial management and control techniques
- Relevant legislative framework and local/national regulatory requirements for the real estate industry
- Professional indemnity
- Business planning
- Professional ethics
- Quality assurance and understanding of policy/procedure
- Problem-solving, judgement, communication and teamwork.

Summary of activity

For this unit, the learner is presented with two news articles; one that describes a recent break-in at the Rogue Realty office and another telling the story of a property manager that mismanaged his client’s property over several years. The learner is required to analyse each scenario and report on what went wrong, then suggest risk management measures that could/should have been taken to avoid the situation or prevent it from happening again. A ‘Risk Management Planner’ form for this is provided in the forms section of the Briefcase.

The second part of the task requires the learner to identify potential risks associated with their specific area of responsibility (eg sales or property management).

NOTE: As the strategies/policies/procedures for managing risk are typically agency-specific, this unit takes a more holistic approach to the competencies covered. It aims to provide the learner with general knowledge and increased awareness of the key risks associated with real estate practice.
The Risk Management Training Manual covers six key areas to support the competencies in this unit:

1. Professional real estate practice.
3. Health and Safety.
4. Finance.
5. The sales process.
6. Property management.

Special features

This unit has a lot of interactive learning exercises and includes a number of external websites. There is also a lot of commonality with competencies in other units such as ‘Implement Personal Marketing Plan’, in particular the section on professional conduct. The ‘Virtual Realty Legal Eagle Quiz’ appears here (in the same format as that presented in ‘Implement Personal Marketing Plan’. The REIBS website also has several articles that are relevant to this unit. Cliff Martin appears regularly through this unit to offer his ‘tips’ for managing risk. Virtual Realty’s OH&S Manual is also introduced here.

You may wish to replace the Risk Management planner (used in the task) provided with one of your own. You should also check all the URL’s used in this unit to ensure they are still valid.

Challenge

This unit is fairly straightforward and may be seen as rather basic for learners with real estate experience or a professional background. If you encounter this, we recommend that you add challenge to the unit by instigating a lot of collaborative work such as discussions on pertinent topics. Suggestions are provided on the following pages. You may also like to increase the relevance of the content by inviting discussion on ‘real life’ situations that learners have encountered or by sourcing news articles relevant to risk management.

Assessment suggestions

Learners could submit the 2 reports on the news articles and personal Risk Management strategy to you for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used. The skills taught in this unit cross over with others (for example, communication skills is a competency found in several units) and learners may have already demonstrated their competency in these areas.
Alternative approaches and suggested collaboration activities

The following information relates to the six sections of the Risk Management Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

**Step 1:**

Professional real estate practice.

*Covers professional practice issues and risks such as unconscionable conduct, lapsed registration, disclosure of information, knowledge of legislation and regulations, disclosure of interest, competitive behaviour and recommendations and advice to client. This content is presented in the form of ‘popup windows’ from the main step 1 page of the manual.*

This step offers many opportunities for customisation of the content to improve its relevance, as well as many opportunities for collaborative discussion and sharing of experiences. We suggest that you read through all the sections of step 1 to familiarise yourself with the content prior to delivery. You may choose to direct learners to specific elements of this step, since it is presented in discrete ‘chunks’ for each area of professional practice.

In the ‘unconscionable conduct’ section, Cliff presents his “Five E’s”, which are his strategies to guard against unconscionable conduct. You could invite learners to compile their own list and post them to the discussion board for discussion. You could also pose some tricky questions on the board and ask learners to decide whether or not they constitute unconscionable conduct.

In the competitive behaviour section, Rick Hamilton tells of a situation in which he was subjected to anti-competitive conduct by another agency. You may like to encourage discussion on this topic, particularly if your learners work in a very competitive environment such as commercial real estate in a CBD location. This section also introduces Virtual Realty’s ‘Customer Satisfaction’ survey – you could ask learners to source a similar document from their own agency as a comparison and discussion point.

The disclosure of information section contains 3 scenarios and asks the learner to decide whether the agent should disclose. These scenarios were deliberately designed to be unclear in order to ‘force’ the learner to think carefully about their duty of disclosure. A discussion on these scenarios would be a valuable way to debrief any uncertainty on this topic.
The section on legislation has much in common with the content presented in step 4 of the Training Manual for ‘Implement Personal Marketing Plan’. You may like to modify your delivery and/or facilitation of this section if your learners have already completed the other unit, although this step does go into a little more detail about these issues.

This step may require a lot of your input, as the content is not specific to any State/Territory. References are made to legislation and/or regulations that are consistent across Australia (for example, the privacy act), however the majority of this information will need to be provided from your own sources.

Alternatively, send the learners on a ‘quest’ to find all the relevant documentation for Acts, legislation and regulations for the real estate industry in their own region – you might need to point them in the right direction to get started.

**NOTE:** we recommend that you check this section prior to delivery to ensure that the information presented is still accurate, as legislation may have changed since the Toolbox was developed in mid-2002.

‘Legal Eagle Quiz’:

You could facilitate this quiz either by asking learners to submit their answers privately to you by email/fax or posting their answers to the discussion board for comparison with others.

Most of the questions are State/Territory specific, so you will need to prepare answers. Note that question 7 has two parts. The answers to questions 4, 5, 8, 10 and 12 are as follows:

**Question 4:** the three elements in page 6 of the summary.pdf document from the REIA website are:

- One party to a transaction suffered from a special disability or disadvantage, in dealing with the other party;
• The disability was sufficiently evident to the stronger party; and
• The stronger party took unfair or unconscionable advantage of its superior position or bargaining power to obtain a beneficial bargain.

**Question 5:** the two word answer is ‘reasonable grounds’.

**Question 8:** the answer is ‘false’.

**Question 10:** the answer is of course ‘No’. This could be an interesting topic for discussion – ‘what value is a code of conduct?’

**Question 12:** the REIA glossary shows 4 kinds; false or fraudulent misrepresentation, negligent misrepresentation, innocent misrepresentation and false representation.

You may choose to facilitate discussion on any of these issues, as industry legislation and regulations is not specifically covered in any unit of this course but is essential knowledge for new industry members.

In the recommendations and advice to clients section, a multiple choice interaction is presented in which learners have to decide which response to give to a client’s question. A debrief discussion on this topic may be beneficial if you notice any doubt or uncertainty about this area of professional standards.

The disclosure of interest section links to an article in the REIBS site. You may like to hold a facilitated discussion to explore this topic further and invite learners to share their experiences.
<table>
<thead>
<tr>
<th><strong>Step 2:</strong> Managing security risks.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This section identifies 4 key security risk areas; property keys, property information, confidential information, staff and theft/burglary.</td>
</tr>
</tbody>
</table>

This step presents many opportunities to facilitate interesting discussion on these 4 areas of security risk. Learners may have stories to tell of their own experiences in this area, and this should be encouraged in order to improve the relevance of this content.

In the section on property keys, the security procedures at Virtual Realty are explained. As these may differ from the security procedures for property keys that are in place at your learners’ agencies, a discussion on different security procedures for property keys may be worthwhile.

You could ask the group what measures they take to protect their own personal safety whilst conducting real estate business and facilitate a discussion board discussion in which the group identifies and discusses various strategies that could be effective.

The subject of security is a hot topic and you may like to consider securing a guest speaker on this topic. An online chat would be an excellent way to provide learners to ‘talk’ to an expert on this subject.
**Step 3:**

Health and Safety.

*This step covers important information about maintaining and improving your health and safety whilst conducting real estate business. It covers areas such as ergonomics, safe driving, first aid, wellness, health and nutrition, emergency procedures and managing stress.*

*The Virtual Realty OH&S manual is introduced here, and is available as a resource in the VR Training Room.*

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Since real estate agents are at high risk of ‘burnout’ and staff turnover is a critical issue across the industry, this section is worth exploring in some detail. You may find that learners have come from office or similar backgrounds and therefore have a good understanding of OH&S, ergonomics etc however in general this is a greatly neglected area.

You could ask learners to conduct an ‘ergonomics audit’ on their own workplace or home office. To keep it simple, learners could develop a quick checklist to use; alternatively you may like to develop a comprehensive checklist or ask learners to develop one. You may also be able to source a good checklist from the websites provided in this section. Learners could then post the results of their audit to the discussion board for comment and discussion.

The ‘dealing with emergencies’ section contains a fun, interactive exercise in which a fire has started at Virtual Realty and the learner is required to follow the correct emergency procedure in a 20 second time limit. You could run this activity as a competition and see who can do it the fastest.

Gail Vanderburg presents her top tips for managing busy workloads in this section. You could facilitate a collaborative activity that asks learners to post up their own ‘top tips’ for managing stress, and together compile a list of the best ones. There are also 3 websites listed on this page, you could ask learners to post up a summary of each one or allocate a site to a group/team/pair of learners and ask them to post up a summary. An invitation for learners to post up recommended resources such as books or URL’s could work well.
Step 4:  
Finance.

*This section provides an overview of the main risks associated with the financial side of agency business – with a focus on trust accounts and bond monies. It is not a comprehensive manual on all aspects of financial risk.*

*Some information is also presented on valuing a real estate business.*

There is an article in the REIBS site that relates to this section and details a situation where an agent misappropriated funds. You may like to generate further discussion around this topic.

The information in the sections ‘rental trust accounts’ and ‘sales trust accounts’ is minimal, as this is covered comprehensively in other units within the Sales and Property Management streams. If, however, you are not delivering these other units, you may like to supplement the content provided here by inviting learners to read through relevant sections of other Training Manuals in the Virtual Realty Training Room.

The section on valuing a real estate business contains links to 3 websites that contain a lot of interesting information about the value of real estate in general and the specific financial values associated with real estate business. It would be valuable to debrief this section with a facilitated discussion on what was learnt from the information on these sites.
<table>
<thead>
<tr>
<th><strong>Step 5:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The sales process.</strong></td>
<td>The information in these sections is minimal, as it is covered comprehensively in other units within the Sales streams, in particular; Provide Property Appraisal, Obtain Property Listings, Monitor Sales Process and Private Treaty. If, however, you are not delivering these other units, you may like to supplement the content provided here by inviting learners to read through relevant sections of other Training Manuals in the Virtual Realty Training Room.</td>
</tr>
<tr>
<td><em>In this section, Gail presents 3 main risks associated with the sales process; badly written contracts, lapsed authority (an example completed listing authority is presented) and delayed settlement. The second section deals with under and/or over valuing a property.</em></td>
<td>An example of a completed Virtual Realty Listing Authority is provided. You may like to ask learners to source a document from their own agency and compare it with the one provided.</td>
</tr>
</tbody>
</table>

You could also facilitate a game-based activity in which learners have to identify a risk with the sales process (ie one that is not included here). One group could identify the risk while the other has to develop a strategy to manage it. You could then swap team roles and repeat the activity. This would work well in a facilitated discussion board discussion.  

Under/overvaluing a property is covered here but explained more thoroughly in the unit Provide Property Appraisal. You may like to run a quick revision on this section if you feel it is required.  

The REIBS article ‘Agency sued in home value dispute’ may be a good conversation starter if you would like to encourage discussion on this issue. |
**Step 6:**

**Property management.**

*Provides an overview of the risks involved with property management, with a focus on lapsed management authority and poor tenant selection*

The information in these sections is minimal, as this is covered comprehensively in other units within the Property Management streams. If, however, you are not delivering these other units, you may like to supplement the content provided here by inviting learners to read through relevant sections of other Training Manuals in the Virtual Realty Training Room.

There is an example provided of Virtual Realty’s management authority. You may like to ask learners to source a document from their own agency and compare it with the one provided.

There is also an example provided of Virtual Realty’s tenant application form. You may like to ask learners to source a document from their own agency and compare it with the one provided.

**NOTE:** these are the same example documents as found in the Property Management units.

You could also facilitate a game-based activity in which learners have to identify a risk with the property management process (i.e. one that is not included here). One group could identify the risk while the other has to develop a strategy to manage it. You could then swap team roles and repeat the activity. This would work well in a facilitated discussion board discussion.

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**Preparing learners for the resources**

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. You will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.
Other related resources or activities

The unit PRDRE30A ‘Implement Personal Marketing Plan’ has a section on professional standards that includes legislation and industry guidelines, but not in the detail that is provided here. Implement Personal Marketing Plan is a unit within the Business Practices stream and can be accessed from the Diary, the Training Room or the stream index page.

There is also a lot of crossover between Manage Agency Risk and most of the units in the Sales and Property Management streams. If your learners are completing all the units in this Toolbox, you could consider modifying your delivery of Manage Agency Risk to avoid repetition.

Ways of customising the resources

As outlined in the suggested activities previously, you will need to add State/Territory specific information and resources for step 1. PDF and Word documents/forms can be replaced with industry examples.

Ways of promoting collaboration between learners

There is a lot of potential for interesting discussion on the points covered in this unit. In particular, step one ‘professional standards’ is likely to raise some debate over what individuals see as ‘appropriate’ since personal standards vary greatly. The suggested activities outlined previously for this unit would work well if structured in teams or pairs.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.

If you are delivering all the units in the Toolbox, you could consider facilitating the task in Manage Agency Risk as a group activity and/or discussion rather than a structured, formal task. This task would also work well as a way of encouraging reflection on the content of previous units in the Sales and/or Property Management streams as it encompasses a lot of the same competencies, skills and knowledge.
Clarify and Confirm Property Information Requirements

*(Business Practices stream)*

Unit of competence covered:

PRDPOD62A – Clarify and Confirm Property Information Requirements

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Discuss and clarify requirements.</td>
<td>1.1 The nature and scope of the enquiry is clarified to the satisfaction of both parties.</td>
</tr>
<tr>
<td></td>
<td>1.2 Any additional information required is identified, and arrangements clarified and confirmed.</td>
</tr>
<tr>
<td></td>
<td>1.3 The capability of the organisation in the area under discussion is established, and any potential conflicts of interest are clarified.</td>
</tr>
<tr>
<td>2. Confirm processes for providing information.</td>
<td>2.1 Information is provided according to organisational policy and service provision guidelines.</td>
</tr>
<tr>
<td></td>
<td>2.2 Potential legal complications and professional indemnity issues involved in the provision of the required information are identified and addressed to the satisfaction of both parties.</td>
</tr>
<tr>
<td></td>
<td>2.3 Processes and terms under which the information might be provided are negotiated, and agreement reached to the satisfaction of relevant parties.</td>
</tr>
<tr>
<td>3. Prepare and provide information.</td>
<td>3.1 Information collected satisfies agreed requirements.</td>
</tr>
</tbody>
</table>
Purpose of activity

This unit covers advice to clients on the market and/or on specific property. The information may be provided as part of general information about services or products or as part of the internal processes and procedures of the company. Sources of information may involve professional opinions from outside sources, including building and construction professionals, real estate agents, lawyers and financial advisers.

Underpinning knowledge and skills

- General knowledge of prevailing property market conditions.
- Operational structures, services and products.
- Principles of business and property law which apply in the area under discussion.
- Applied research methods.
- Sources of information and assistance.
- Organisational policies and procedures in the area under discussion.
- Communication, including interpersonal negotiation and selling techniques.
- Work planning and organisation.
- Problem-solving (including fee determination) and risk management in relation to property information requirements.
- Finding and using property information.
- Exercising judgement in relation to property information requirements.
- Literacy.

Summary of activity

Cliff Martin introduces the learner to the types of professional and legal issues involved with the provision of property information. Supported by the various resources provided in this Toolbox, and using their own knowledge of the local market and sources of information, the learner is required to undertake three tasks;

1. Choose a property in their local area and undertake research to source a list of enquiries to be answered. A worksheet is provided to assist them in the requirements of this task, which are detailed on the task page of the unit.

2. Look at 3 scenarios involving real estate agents attempting to handle requests for property information from clients. A report on what each agent did ‘wrong’ is required.

3. Create a list of the 5 most common enquiries that they receive as a real estate agent, explain how these enquiries would be handled and identify any risks associated with provision of the information.
Special features

There is no Training Manual for this unit. It is designed to be undertaken as a ‘real life’ activity that requires learners to be self-directed and use their research, planning, organisation, communication and analytical skills.

The level to which you facilitate and/or support this unit is completely up to you. If your learners are experienced in finding property information such as market values, water rates, floor plans etc and know where to go to find such information you may choose to provide only intermediary support and encourage learners to be completely self-directed.

For experienced learners you may also consider conducting the second and/or third task as a group discussion rather than a formal written task.

Alternatively, if your learners are new to the industry and unsure how to go about sourcing the required information, you may decide to structure the first task into separate activities and provide a high level of support and guidance.

This unit would work very well as a revision exercise after completing all the other units in the Toolbox, although it must be noted that PRDPOD62A is a CORE unit for the Certificate IV qualification. It also lends itself very well to collaboration such as learners working in pairs or groups to complete the tasks. There is also a lot of opportunity to facilitate group discussions (using the discussion board, email or chat) on topics such as ‘top tips for handling enquiries’ or legal matters.

Assessment suggestions

Learners could submit the 3 tasks as evidence towards competency assessment for this unit. They could also be assessed on their discussion board postings or chat room conversations if these methods are used.

The skills taught in this unit cross over with others (for example, communication skills is a competency found in several units) and learners may have already demonstrated their competency in these areas.

Assessment should determine the extent to which the candidate is able to perform to the standard required in the workplace. Information obtained from the workplace or actual work experience should be treated as commercial-in-confidence.

Alternative approaches and suggested collaboration activities

You may like to consider adding value to this unit by making it more workplace specific, that is; focus on the policies and procedures for dealing with property information requests at the learners’ workplaces. This could lead to some interesting discussions on differences across the industry.
NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

**Preparation required**

To support learners in this unit, you may need to:

- Know where to find each piece of information required for the task and be aware of any obstacles learners may come across, such as having to pay a fee for copies of documents.
- Consider what answers you are looking for in the second task. Detailed below are some suggested responses:

**MARK CONNORS SCENARIO**

Part One:

1. Mark should have confirmed the time with the vendor before making the appointment with Pamela.
2. Mark should have taken the caller’s telephone number and other details so he could contact her with the correct appointment time and any extra information about house.
3. Mark should have confirmed the listing details before giving out information about it. In fact, 17 Turner Place has four bedrooms but only one bathroom and a toilet not two bathrooms.

Part Two:

1. Mark puts his client under pressure by arranging a viewing without consulting her first. He also admitted his incompetence by telling Jill he didn’t get Pamela’s number – notice he also got Pamela’s name wrong, obviously he didn’t take a note of her details when she was on the phone.
2. Mark checks the number of bathrooms with his client when he should have already gained this information from the listing details.
3. Mark didn’t get Pamela’s number and will have to meet her outside the house, and then tell her he can’t show her through today. This makes him look incompetent and reflects badly on the company.
Part Three:

1. Mark didn’t get Pamela’s number so had to meet her at the property to tell her she couldn’t view it, resulting in Pamela being frustrated with his poor service.
2. Mark had to admit to Pamela that he had given her the wrong information about the property.
3. Pamela has to drive back to her office to check her schedule to see if the Wednesday appointment suits. If it doesn’t she’ll ring Mark who will have to ring the vendor and then ring Pamela again to try and firm up an appointment time.
4. Mark has almost definitely lost a potential client and sale.
5. This last scene could have been positive if he had taken the right actions back at scene 1.
6. He called her the wrong name.

How Rick’s service was more professional and effective: (part one)

1. Rick checked the listing in the sales file so he could give the vendor the correct information.
2. He made an alternative viewing time in case the first didn’t suit the vendor and made arrangements to check with the vendor before confirming the viewing time.
3. Rick noted down Pamela’s name and number so he could confirm the appointment.

Part Two:

1. Rick confirmed a suitable time for his client
2. Rick was able to offer his client an alternative when the first appointment time didn’t suit.
3. Rick has confirmed an appointment time that suits everyone and provided a professional level of service that is very likely to result in a happy vendor and satisfied buyer.

JEAN BYRNE SCENARIO

Part One:

1. Jean should have called Executive Realty to check if she could show a potential buyer through and asked for a conjunctional.
2. Jean should have explained to Martin that she couldn’t automatically show him the property without speaking to the listing agent at Executive Realty.
3. Jean has not confirmed with the vendor of 5 Batavia Place whether this appointment time will be suitable, or taken Martin’s details in case she needs to contact him.
4. Jean did not ask Martin for details of the other property in Batavia Place, so she won’t know which house she’s talking about when she rings Executive Realty.

Part Two:

1. Jean should have asked Jane if she would grant a conjunctional before explaining he had made an appointment.
2. Jean forgot to get the caller’s number so she will have to meet him at her property and then explain that she can’t show him through the other home.

What Gail Vanderburg did more effectively (part one):

1. Gail took the caller’s number and negotiated two alternative times to view the property.
2. Gail explained that she needs to contact Executive Realty to view the other home.
3. Gail asked Martin for the address of the other property.
4. Gail gave Martin a commitment that she would call him back as soon as possible.

Part Two:

1. Gail explained the situation to Jane before requesting a conjunctional.
2. Gail checked that the proposed viewing time suited Jane and made arrangements to meet her there.
3. Jane agreed to a conjunctional because she knows Virtual Realty are a professional and ethical agency, having dealt with Gail before.
4. Gail has the client’s details so she can call him back and confirm the appointment.
5. Gail has confirmed an appointment time that suits everyone and provided a professional level of service that is very likely to result in a happy vendor and satisfied buyer.

TYLER BOWEN SCENARIO

Part One:

1. Tyler has not adhered to the Privacy Act by agreeing to give out a client’s personal information to a third party. He is now liable for prosecution and would also face disciplinary action from the licensing authority if a complaint was made.
2. Tyler should have either told Graham he was unable to help him or found a better solution to the problem.
3. Tyler has a clear conflict of interest here – Graham used the lure of future business to encourage Tyler to act unlawfully.
4. If Malcolm Egan takes offence to his details being passed out it will cause friction between Tyler and Graham Black, which could result in the loss of their business relationship.

How Elaine Chang handled the information request more effectively:

1. Elaine has found a solution to her client’s problem and kept within the law.
2. Elaine offered to help out a client, strengthening her business relationship with Mr Black.
3. Elaine managed to maintain a professional level of service and it seems that future business with Mr Black is safe.

Preparing learners for the resources

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. You will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, agency/industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

You will also need to make sure learners realise that the structure of this unit is different in that it does not have a Training Manual. You may also need to prepare learners for the more self-directed learning design of this unit.

Other related resources or activities

Some of the information in other units could be useful in this unit – for example, the unit Provide Property Appraisal explains the process for obtaining property information such as last selling price and current market value. Resources such as the REIBS website property database and the Government of Blue Sky City website could also be useful.

Ways of customising the resources

Any of the content in this unit can be easily customised as it predominantly HTML only.
Participate in, Lead and Facilitate Work Teams (Business Practices stream)

Unit of competence covered:

BSXFMI404A – Participate in, lead and facilitate work teams.

NOTE: this is a unit of competence from the Frontline Management Training Package.

Frontline management has a key role in leading, participating in, facilitating and empowering work teams/groups within the context of the organisation. It plays a prominent part in motivating, mentoring, coaching and developing team members, and in achieving team cohesion.

This is a customised version of a competency unit endorsed in the Frontline Management Initiative accredited training program and the title and national code of that source unit have been retained.

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| 1. Participate in team planning. | 1.1 The team establishes clearly defined purpose, roles, responsibilities and accountabilities within the organisation’s goals and objectives.  
1.2 The team performance plan contributes to the organisation’s business plan, policies and practices.  
1.3 The team agrees to processes to monitor and adjust its performance within the organisation’s continuous improvement policies.  
1.4 The team includes in its plans ways in which it can benefit from the diversity of its membership. |
| 2. Develop team commitment and cooperation. | 2.1 The team uses open communication processes to obtain and share information.  
2.2 The team encourages and exploits innovation and initiative.  
2.3 Support is provided to the team to develop mutual concern and camaraderie. |
3. Manage and develop team performance.

<p>| | |</p>
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>3.1</td>
<td>The team is supported in making decisions within its agreed roles and responsibilities.</td>
</tr>
<tr>
<td>3.2</td>
<td>The results achieved by the team contribute positively to the organisation’s business goals.</td>
</tr>
<tr>
<td>3.3</td>
<td>Team and individual competencies are monitored regularly to confirm that the team is able to achieve its goals.</td>
</tr>
<tr>
<td>3.4</td>
<td>Mentoring and coaching supports team members to enhance their knowledge and skills.</td>
</tr>
<tr>
<td>3.5</td>
<td>Delegate’s performance is monitored to confirm that they have completed their delegation/assignment.</td>
</tr>
</tbody>
</table>

4. Participate in, lead and facilitate the work team.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Team effectiveness is encouraged and enhanced through active participation in team activities and communication processes.</td>
</tr>
<tr>
<td>4.2</td>
<td>Individuals and teams are actively encouraged to take individual and joint responsibility for their actions.</td>
</tr>
<tr>
<td>4.3</td>
<td>The diversity of individual’s knowledge and skills is used to enhance team performance.</td>
</tr>
<tr>
<td>4.4</td>
<td>The team receives support to identify and resolve problems which impede its performance.</td>
</tr>
</tbody>
</table>

Purpose of activity

Learners will gain an understanding of the key areas involved in working effectively as a team member or a team leader in a real estate setting.

Underpinning knowledge and skills

- Collecting, analysing and organising information
- Communicating ideas and information
- Planning and organising activities
- Working with others and in teams
- Using mathematical ideas and techniques
- Solving problems
- Using technology
- Ethical standards
- Access and equity principles and practices
- Quality and continuous improvement processes and standards.

**Summary of activity**

For this unit, the learner is required to choose two from a list of tasks, as follows:

- Consider what level of teamwork is happening at your agency. How would you rate your agency in terms of working effectively as a team? Write a brief report detailing the types of team-based activities that take place, and how well these strategies are working. Include your own suggestions for improvements to current practices.

- What sort of performance management procedure or process is in place at your agency? Describe how performance is managed, both for individuals and as an agency team. If there is no formal process in place, identify a strategy that you feel would be effective in your agency and describe how this could work.

- Investigate the area of goal setting, as it applies to both individuals and teams. Write a brief report on what sort of goal-setting you feel is important – firstly for yourself as an agent, and secondly for a whole agency. Look at both short-term and long-term goal setting, and include details of your own goals for the next 6 months.

- Undertake a ‘team effectiveness’ evaluation for your agency. Develop the criteria on which the evaluation will be based, and complete the evaluation. Ideally, ask your colleagues to help you. You may be able to find a suitable evaluation on the Internet, if so – include a copy and a reference as part of the task.

**NOTE:** As the level of “teamwork” is typically agency-specific, this unit takes a more holistic approach to the competencies covered. It aims to provide the learner with general knowledge and increased awareness of the key success factors behind effective teamwork and team leadership.
The Work Teams Training Manual covers six key areas to support the competencies in this unit:

1. Participate in team planning.
2. Develop team commitment and cooperation.
3. Manage and develop team performance.

Special features

This unit offers a wide scope for collaboration and sharing of ideas through discussion. The open plan of the tasks and the flexibility offered by a lean provision of content allows you to modify your delivery to suit your audience.

Challenge

This unit is fairly straightforward and may be seen as rather basic for learners with real estate experience or a professional background. If you encounter this, we recommend that you add challenge to the unit by instigating a lot of collaborative work such as discussions on pertinent topics. Suggestions are provided on the following pages. You may also like to increase the relevance of the content by inviting discussion on ‘real life’ situations that learners have encountered or even by comparing the concept of teamwork within the real estate industry with that elsewhere.

Assessment suggestions

Learners could submit their completed tasks to you for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used. The skills taught in this unit cross over with others (for example, teamwork is a competency found in several units) and learners may have already demonstrated their competency in these areas.
**Alternative approaches and suggested collaboration activities**

The following information relates to the three sections of the Work Teams Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>This step explains the importance of the planning process and how it contributes to an agency’s success. The concept of planning as a team is introduced.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate in team planning.</td>
<td>Because the level of “teamwork” varies greatly from agency to agency and across the industry, the content in this step is lean. This has been done to enable you as the teacher to adapt your delivery to suit your target audience. You could explore the topic of ‘team planning’ in more ways by inviting discussion on how planning takes place in each learner’s agency.</td>
</tr>
<tr>
<td>Covered the concept of team planning in a real estate agency context.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2:</th>
<th>Because the level of “teamwork” varies greatly from agency to agency and across the industry, the content in this step is lean. This has been done to enable you as the teacher to adapt your delivery to suit your target audience. You could explore the topic of ‘team commitment and cooperation’ in more ways by inviting discussion on how effectively a team spirit is working in each learner’s agency.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop team commitment and cooperation.</td>
<td></td>
</tr>
<tr>
<td>This step looks at the ways in which a team spirit can be established and encouraged in a real estate agency context.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3:</th>
<th>Because the level of “teamwork” varies greatly from agency to agency and across the industry, the content in this step is lean. This has been done to enable you as the teacher to adapt your delivery to suit your target audience. You could explore the topic of performance management in more ways by inviting discussion on how this is conducted in each learner’s agency.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage and develop team performance.</td>
<td></td>
</tr>
<tr>
<td>This step looks at performance management in the context of a real estate agency team. The strategies of coaching and mentoring are explored.</td>
<td></td>
</tr>
</tbody>
</table>
Preparing learners for the resources

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. You will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

Other related resources or activities

N/A

Ways of customising the resources

You will need to modify the way that this unit is delivered to suit the agency environment in which your learners work.

Ways of promoting collaboration between learners

There is a lot of potential for interesting discussion on the points covered in this unit. A good strategy would be to invite learners to talk about how their agency staff do (or don’t) work together as a team and explore the issues related to teamwork in an agency setting.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.

If you are delivering all the units in the Toolbox, you could consider facilitating the task in this unit as a group activity and/or discussion rather than a structured, formal task.
Provide Property Development and Marketing Services *(Agency Services Stream)*

Unit of competence covered:

**PRDRE21A – Provide Property Development and Marketing Services**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify development opportunities.</td>
</tr>
<tr>
<td>1.1</td>
<td>Relevant property information is collated and analysed.</td>
</tr>
<tr>
<td>1.2</td>
<td>Development concepts are formulated from opportunities identified from an analysis of property information.</td>
</tr>
<tr>
<td>2</td>
<td>Assess viability.</td>
</tr>
<tr>
<td>2.1</td>
<td>Opportunities for development are assessed, in conjunction with allied property professionals, against known cost factors and market trends to determine their availability.</td>
</tr>
<tr>
<td>3</td>
<td>Approach potential clients.</td>
</tr>
<tr>
<td>3.1</td>
<td>Agency clients known to have an interest in the type of property development under consideration are approached.</td>
</tr>
<tr>
<td>3.2</td>
<td>Information on the proposed development is presented in a manner which is not prejudicial to the interests of other parties.</td>
</tr>
<tr>
<td>3.3</td>
<td>Information is presented in a manner which informs and motivates the potential client to enter into negotiations for property development and marketing services.</td>
</tr>
<tr>
<td>4</td>
<td>Discuss and clarify instructions with potential clients.</td>
</tr>
<tr>
<td>4.1</td>
<td>The potential client is advised on, aware of, and understands the services available in relation to the development of the property under consideration.</td>
</tr>
<tr>
<td>4.2</td>
<td>The capability of the organisation for the assignment and any potential conflicts of interest are identified and steps taken to minimise the effect of these on the project.</td>
</tr>
<tr>
<td>4.3</td>
<td>The scope of the project and the</td>
</tr>
</tbody>
</table>
potential client’s interest in the proposals are confirmed.

4.4 Any relevant subcontracting arrangements, including quality assurance are negotiated to the satisfaction of relevant parties.

<table>
<thead>
<tr>
<th>5 Determine and negotiate a fee.</th>
<th>5.1 A fee is negotiated, consistent with the scope of the project, the strategies agreed with the client, and the agency’s pricing policy.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5.2 Agreement reached on the fee is recorded for future reference.</td>
</tr>
</tbody>
</table>

6. Confirm assignment.

| 6.1 Confirmation is sufficient to provide an accurate legal record of agreement reached between the parties. |

**Purpose of activity**

This unit covers assessing and maximising opportunities for new property development and associated property marketing services. It is not intended to cover the project management requirements involved in construction oversight.

**Underpinning knowledge and skills**

- Principles of project management in real estate agency practice and allied property services.
- Legal requirements for the management of the project, including relevant statutes.
- Principles of business law and property law which apply to the project.
- Costing and budgeting for property development and marketing services.
- Strategic planning for property development and marketing services.
- Communication, including commercial negotiation, team and interpersonal communication.
- Project planning, including work organising, risk management, time management, scoping and staging of proposals (logistics) and the application of performance indicators in project management.
- Numeracy, including estimating, costing and budgeting of services and materials.
- Problem-solving, use of information technology.
- Tender preparation for property development and marketing services.
Summary of activity

The learner is required to follow and apply the 6 steps involved in the provision of property development and marketing services at an individual and/or agency level. The unit presents two tasks; firstly to gather information and formulate property development concepts for a client, and then to identify potential buyers and develop a marketing strategy for the newly developed property. To support them in these tasks, the learner is directed to use resources that can be found in the Laptop, Briefcase and the task page. The 6 steps are:

1. Gather information and identify development opportunities.
2. Formulate property development concepts.
3. Assess the viability of development opportunities and concepts.
4. Approach potential clients.
5. Discuss and clarify instruction with potential clients.
6. Determine and negotiate a fee and confirm the assignment.

TASK ONE:

There are a number of property development concepts that could be applied to the Johnsons’ properties, although only one or two are really viable. If your learners are very new to property development, you may need to provide some additional support and assistance to steer them in the right direction.

In particular, ensure that they find the following information from the planning codes, certificates of title and information available via the map:

1. The minimum subdivision sqm must be 360sqm.
2. Maximum footing of the house to be 50% of total block size.
3. Minimum street frontage is to be 24m to place more than one dwelling on.
4. Minimum access drive to rear block must be between 4 and 6mtres in width.
5. The definition, rules and restrictions on a heritage listed property, which state it cannot be knocked down.
6. There is an easement from the water authority running down the boundary of lot 1 and lot 2 that is 4m either side of the boundary.
7. The mains sewer runs along the boundary of the two roads.

There is a number of solutions for learners to arrive at, but really only one or two that would be viable. You may need to be flexible about the way the development options are submitted, as not all learners will be able to provide you with an electronic drawing, or may find it easier to hand-draw a plan. Ensure that you offer a fax number or mail address for this purpose.

Consider also the type of dwellings that learners propose – they should be thinking of two-storey homes on the rear block/s to capitalise on the ocean views available from this location.
Pictured below are the Johnsons’ 3 properties. NOTE: grey is the easement, brown is the sewer and red is the roads.

The most viable options for development are:

**Option 1** – subdivide 2 of the blocks to result in a total of 5 lots, each with a single dwelling.

This solution is OK, but it does not maximise the number of potential dwellings although it represents good resale value due to the size of the blocks.

Learners will need to think about the position of each dwelling to ensure that each one retains views of the ocean.
Option 2 – a variation on option 1, resulting in 5 single dwellings and a strata block on the middle lot.

This solution is also OK but it does not maximise the number of dwellings that could be built.

Option 3 - gives you 6 dwellings, and good sized lots.

A good proposal as it gives the sea front property and the 4 behind clean, easy access blocks. Although it will require more preliminary work with the blocks being surveyed and the certificate of titles amended etc, overall it offers the best resale value.
Option 4 – If you are presented with anything like option 4, you’ll need to point out that there is an easement running down the boundary between no1 anchor drive and no2 anchor drive that will affect the building.

TASK TWO:

Special features

The forms that the learner will use are available in Word format in the forms section of the Briefcase. This allows the learner to either print out the forms for completion or to fill them in online. You can alter the information on rollover within the PDFs by using the ‘Forms’ tool inside Adobe Acrobat.

There is a section of the REIBS Archived Articles titled ‘Property Development’. In here you will find many articles relating to property development and marketing.

The Government of Blue Sky City has a section titled ‘Planning Division’. In here you will find a range of ‘Fact Sheets’ relevant to property development, as well as various forms and information brochures that may be useful to learners in this unit.

You may need to align this second task with the proposals submitted by your learners in task one.
Challenge

There are a number of options available for the 3 properties owned by the Johnsons. Learners will need to pay careful attention to the profiles of each property (available via the Blue Sky City Map) – in particular, the corner block that has a heritage listed home. If they fail to thoroughly read the Certificate of Title for the corner property, they may submit inappropriate development options such as demolishing the old beach house. The size, shape and position of the two vacant blocks will affect the development options available to the Johnsons, as will the zoning regulations for Blue Sky City.

Assessment suggestions

Learners could submit all the documents they have created for assessment. They could also be assessed on their discussion board postings or chat room conversations if these methods are used.

Alternatively, you could ask learners to submit a portfolio of work they have done on property development and marketing.

Alternative approaches and suggested collaboration activities

The following information relates to the six steps in the Property Development and Marketing Services Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th>Step 1: Gather information and identify development opportunities.</th>
</tr>
</thead>
<tbody>
<tr>
<td>This step covers the research component required in order to be able to identify development opportunities. It highlights issues to be aware of, such as zoning codes, encumbrances on land and a heritage listing on a home. Environmental impact is also explained.</td>
</tr>
</tbody>
</table>

You could ask learners to source example of a Certificate of Title with an issue that could affect development opportunities for the property. Alternatively, you could provide some examples and facilitate a discussion on what they need to look out for when reading through a Certificate of Title.

You could ask learners to research information on the zoning codes that apply in their State/Territory, and facilitate a discussion on these and their application to property development scenarios.

A lot of the information in this step is represented in terms of Blue Sky City. You may need to localise this section by making reference to local councils, planning departments etc. In particular, the section on Environmental Impact and associated issues
Step 2: Formulate property development concepts.

This section explains subdivision and amalgamation of lots as a property development concept, and contains links to external sites of property development companies to showcase the range of concepts available.

NOTE: this is the second performance criteria of the first element of competence ‘Identify development opportunities’. It has been separated in the Training Manual to provide extra focus to this topic.

There is an interactive activity in this section on land size and shape – the purpose of this activity is to help learners understand that they need to explore a range of ideas and combinations, and consider many issues when formulating property development concepts. It also seeks to highlight the importance of having researched the properties thoroughly to identify any restrictions and/or issues that need to be considered. You may like to facilitate a discussion around this activity, as it is likely that learners will come up with a range of options in addition to those presented in the interaction.

Step 3: Assess viability.

In this step, learners will find out about the range of issues to consider when working out the viability of a property development concept. It explains likely fees associated with planning applications etc, as well as operational costs and/or returns.

There is quite a lot of information in this step, some of which may need to be localised. In particular, the section on page two regarding planning application processes and fees.

If you have learners with experience in property development, you could invite them to share their experiences via discussion on the bulletin board. Or for something different – invite a guest speaker in for an online chat, maybe someone from the planning office in your State/Territory or similar.

This step contains scenarios where Cliff and Rick go out and visit specialist professionals for information and advice. You could facilitate a discussion here by asking learners to tell you what sort of services are available in their area if they need assistance or professional advice.

If your learners are involved in larger-scale property developments such as a new estate or land development, you may need to
<table>
<thead>
<tr>
<th>Step 4:</th>
<th>change the focus of this step slightly to include this.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approach potential clients.</strong></td>
<td>If your learners have some experience with property development, you could facilitate a discussion by inviting them to share tips for identifying and approaching potential clients.</td>
</tr>
<tr>
<td><em>Learners learn how to identify potential clients, from their own (or agency's) database and through other avenues.</em></td>
<td>A role play could work well here; you could try a question and answer discussion to enable learners to try out some questioning techniques.</td>
</tr>
<tr>
<td></td>
<td>Venture capital is mentioned here, but not explored in any detail. Depending on the needs of your learners, you may want to facilitate more discussion on this point.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 5:</th>
<th>This step would work well via a facilitated discussion around the main points raised.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Discuss and clarify instructions with potential clients.</strong></td>
<td>In the activity where you see Cliff visiting people, you could invite learners to add to the list of specialist services required.</td>
</tr>
<tr>
<td><em>Learners are presented with some tips regarding the issues and instructions that need to be discussed, clarified and negotiated with clients.</em></td>
<td>The flow chart of the planning application process may not match the process followed in your State/Territory. You could invite learners to identify the differences and/or fill in the gaps according to local requirements and post up to the bulletin board a customised flow chart as a resource for everyone to share.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 6:</th>
<th>If your learners are in an agency, you could ask them to post to the bulletin board examples of contracts they use and/or service agreements used for property development clients. Alternatively, use the example provided as a basis for discussion.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Determine and negotiate fees and confirm the assignment.</strong></td>
<td></td>
</tr>
<tr>
<td><em>Explores the fees that may be associated with property development and highlights the importance of a contract or service agreement between the agency and the client. An example of a completed contract is provided.</em></td>
<td></td>
</tr>
</tbody>
</table>
Preparing learners for the resources

If you choose to do discussion board exercises, you will need to set up discussion threads prior to commencing the activity. As explained earlier, you will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

Other related resources or activities

The Market Property Training Manual contains helpful information on marketing a property, which could be helpful when marketing a property development. As this task also involves property appraisal, some revision of that unit may be beneficial.

Ways of customising the resources

Properties could be replaced to suit the ones in your area. Forms could be replaced with those in your State/Territory. You may also need to customise the content if your learners are more involved in large-scale property developments such as new land releases, or the development of business or industrial properties, as the content presented focuses more on the development of single or group dwellings in a residential context.

Ways of promoting collaboration between learners

There is plenty of opportunity for interesting discussion across the content of this unit. You may also like to consider allocating parts of the task to learners to complete as partners or in teams of 3 or more, since the task is quite lengthy and complex.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Present and Explain Property Reports *(Agency Services stream)*

Unit of competence covered:

PRDRE22A – Present and Explain Property Reports

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Undertake property inspection.</td>
<td>1.1 The inspection is planned to satisfy agency and client requirements.</td>
</tr>
<tr>
<td></td>
<td>1.2 Visual inspections of the inside and outside of the building and surrounds are conducted and overall impressions of structural and aesthetic features are noted.</td>
</tr>
<tr>
<td></td>
<td>1.3 Obvious building defects are observed and noted for future reference.</td>
</tr>
<tr>
<td></td>
<td>1.4 Periodic inspections are scheduled as required to maintain condition of the property.</td>
</tr>
<tr>
<td>2. Define the main features of building styles in the market as they affect the subject property.</td>
<td>2.1 Architectural and construction styles affecting the value of the subject property are identified.</td>
</tr>
<tr>
<td></td>
<td>2.2 Variations from ‘pure’ styles and associated modifications to the original building and surrounds are noted.</td>
</tr>
<tr>
<td></td>
<td>2.3 Current market value is estimated in light of the effect any modifications may have on the market value of the property.</td>
</tr>
<tr>
<td></td>
<td>2.4 Information is collected which will provide a useful and concise record for preparation of the property condition report.</td>
</tr>
</tbody>
</table>
3. Prepare a property condition report.

3.1 Information collected during the inspection and additional researched information is compiled as a clear, concise and accurate record of current condition.

4. Analyse cost benefits of property improvements.

4.1 Preventive or enhancement measures are researched to provide a range of options for consideration.

4.2 Possible structural or aesthetic defects requiring professional opinion or advice are identified and noted for discussion with the client.

4.3 A report is produced which addresses key client concerns and provides a useful reference and decision-making tool.

4.4 Overall condition of the property is estimated in relation to current and predicted property values in the relevant market.

5. Present and discuss condition report.

5.1 The information is presented in a clear and logical fashion and is understandable to the client.

5.2 Immediate and long-term options are clearly presented and cost benefits to each option explained to the client’s satisfaction.

5.3 A report is produced which assists the client make sound and objective decisions about the immediate and long-term value of the subject property.

5.4 Agency services related to improving the condition of the property are explained to the client's satisfaction.

6. Take instructions.

6.1 Client instructions are obtained and recorded for future action.
Purpose of activity

This unit describes the recognition and analysis of property styles and faults in order to advise clients of property values and conditions prior to listing, leasing or refurbishment. Work may be routine, involving the use of templates or form documents. It may also require enquiries and initiative in uncovering hidden faults and defects in buildings. The work will be guided by the scope of the agency/client contract, and the agency marketing, property management and sales policies.

Underpinning knowledge and skills

- General knowledge of architectural styles and common building faults in residential and commercial buildings less than seven storeys high.
- Property market values.
- Common structural design faults.
- Identification of building styles and faults.
- Report writing.
- Presentation skills, including communication.
- Analytical and problem-solving.
- Team work in relation to presenting and explaining property reports.

Summary of activity

For this unit, Rick Hamilton introduces Mr Moffatt, a client of Virtual Realty. Mr Moffatt is considering purchasing an investment property in Blue Sky City and has asked Virtual Realty to prepare property reports for 2 residential homes that he is interested in – one in Sea View, one in Kaluka. Using the photos on the Blue Sky City Map and various resources provided in the Laptop and Briefcase, the learner is required to compile and present 2 property reports detailing all aspects of the property’s style, defects and market value.

The Property Reports Training Manual contains detailed information on all aspects of this task, and covers seven key areas to support the competencies in this unit:

1. When to do a property inspection and/or property report.
2. A property’s current and projected market value.
3. Identifying structural or aesthetic defects that require attention.
4. Suggesting enhancement measures.
5. Preventative measures that can be taken.
6. Analysing the cost benefit of property improvements.
7. Compiling and presenting the property report.
Special features

This unit has a lot of interactive learning exercises and resources, and includes a number of external websites. There is also a lot of commonality with competencies in other units such as those in the Property Management Stream and ‘Market Property’ in the Sales Stream. The REIBS website also has several articles that are relevant to this unit.

You should also check all the URL’s used in this unit to ensure they are still valid.

Challenge

The task for this unit is fairly complex and may present some challenges for learners that have difficulty staying motivated. Suggestions to promote collaboration and learning are provided on the following pages. You may also like to increase the relevance of the content by inviting discussion on ‘real life’ situations that learners have encountered.

You should also be aware that the photos of the 2 houses that require a property inspection may not provide sufficient information for the compilation of a detailed property report. You may like to suggest inspecting a ‘real’ property as a supplementary activity, although property inspections are covered in more detail in the Property Management learning units.

Assessment suggestions

Learners could submit the 2 property reports as evidence towards competency assessment for this unit. They could also be assessed on their discussion board postings or chat room conversations if these methods are used. The skills taught in this unit cross over with others (for example, communication skills is a competency found in several units) and learners may have already demonstrated their competency in these areas.

The Training Package states that this unit should be assessed in conjunction with, or with reference to unit PRDRE37A (Perform and Record Property Management Activities and Transactions). Refer to the Training Package documentation for more information on this.
Alternative approaches and suggested collaboration activities

The following information relates to the seven sections of the Property Reports Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th><strong>Step 1:</strong> When to do a property inspection and/or report.</th>
<th>The content of sections 1 and 2 of this step intersects with that of other units such as Provide Property Appraisal (Sales Stream) and those in the Property Management Stream. If you are delivering these units as well as Property Reports you may like to modify your delivery to avoid repetition of content. The example PCR provided on page 3 could be replaced with a ‘real’ example, either provided by yourself or sourced by the learners. You may like to facilitate a discussion on the pros/cons of a detailed report, for example the time required by an agent to do a thorough PCR could be an issue for some. NOTE: the PCR and inspection process is covered in far more detail in unit PRDRE37A within the Property Management Stream. On page 4, the learner is invited to watch Elaine Chang and Gail Vanderburg inspect the outside areas of a property via an interactive scenario. This activity would work well with a debrief via a facilitated discussion board discussion. In the section on inspecting the inside of a property, the learner can complete an interactive exercise in which they have to pan around a 360 degree photo of the inside of a home and identify 12 things that should be noted on the PCR. This activity would work well with a debrief via a facilitated discussion board discussion. Page 5 of this step links to 3 discrete sections; building styles, construction types and building defects. Each link will take you to a new window, as follows:</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is the largest section of the Training Manual, covering the scenarios in which a property inspection/report would be required, the inspection process (both inside and outside of property) and the forms/templates used. It also covers a lot of information on building styles, construction types and common building faults. An interactive crossword quiz on building defects is a feature of this step, as is the ‘Book of Australian Building Styles’ that can also be located in the Virtual Realty Training Room.</td>
<td></td>
</tr>
</tbody>
</table>

An interactive crossword quiz on building defects is a feature of this step, as is the ‘Book of Australian Building Styles’ that can also be located in the Virtual Realty Training Room.
**Building styles:** contains the ‘Book of Australian Building Styles’ (also available as a stand-alone resource in the Training Room for access at any time). This book showcases key features, value factors, history and materials for common building styles in Australia since the 1840’s. Each section contains several photographs of different styles and also a self-contained glossary with graphics and definitions for key elements. The book finishes at the 1990’s (contemporary style) so you might like to generate discussion on emerging trends and/or new styles such as warehouse refurbishments.

You could also ask learners to look around their own suburb and identify different building styles and post them up to the discussion board. This would be a particularly interesting discussion if your learners are separated geographically as styles tend to be similar in particular areas.

**Common Construction Techniques:** Also available as a stand-alone resource in the Training Room, this book showcases 10 of the most common techniques used for property construction in Australia. Each technique is accompanied by a photograph and details the actual technique and suggested selling points inherent to each one. Any potential negatives for each technique are also explained.

You could ask learners to look around their own suburb and identify different construction techniques used in local homes and post them up to the discussion board. To add variety and challenge, you could facilitate a discussion that asks learners to find out about construction techniques used in commercial properties.

**Building Styles Quiz:** This is designed to be a self-test exercise to check the learner’s understanding of the building styles previously covered. This is also available as a stand-alone resource in the Training Room, in the Puzzles section. You could ask learners to post up their quiz results to the discussion board and check for any trends indicating that specific areas are causing confusion or uncertainty.
**Step 2:**
A property’s current and projected value.

This step explains how to identify a property’s current value via the comparative market analysis process, and the rationale and formula behind calculating a property’s projected (future) value. An interactive calculator is provided for this.

The first section of this step is a revision of the comprehensive section of the unit Provide Property Appraisal (Sales Stream) that covered the process of determining a property’s current market value. If you have already delivered this unit and gone through the process of the CMA you may choose to direct learners past this particular section of step 2.

On page 2, the grapevine shows people talking about how much the property market has improved in Blue Sky City. This would be a good opportunity to invite learners to investigate their local property market and post to the board their findings and comments on this.

On page 3, learners are asked to project a market value for a home at 12 Mullings Drive, Blue Ridge. They should firstly do this manually then use the interactive calculator to check their answer. You may like to create a discussion board activity in which you post up other properties in the REIBS database and ask learners to project a market value for 2, 3 or 5 years’ time. You should check for understanding of the calculations behind the projected market value as this can be confusing for some.

**Step 3:**
Identifying structural and aesthetic defects requiring attention.

This step explains structural and aesthetic defects and provides an extract from a property report done by Rick Hamilton that clearly describes such defects.

This section is closely related to the content presented in step 1, but focuses more on aesthetic and structural issues that can be more difficult to identify.

It also links well with the disclosure of information issues raised in the unit Manage Agency Risk (Business Practices Stream). You might like to refer learners to this Training Manual (see step 1) if you feel revision is required or if they have not done the agency risk unit.

**Step 4:**
Suggesting enhancement measures.

Explains the importance of being able to identify enhancement measures that may improve the property’s value and how to evaluate these measures in terms of market value.

On the first page, Rick’s tips contain URL’s to websites of popular lifestyle television programs that features enhancements, renovations and refurbishments to homes. You could facilitate a discussion on what learners find on these sites or encourage learners to watch particular TV programs, holding a discussion afterwards to share comments and opinions.
| Step 5: Preventive measures that can be taken. | This step relates more to measures taken to prevent damage to a rental property and therefore has some content in common with the units in the Property Management Stream, in particular PRDRE32A.  

Expects the sorts of measures that can be taken to prevent wear, tear and damage to a property, in particular one that is being leased.  

You could ask learners to imagine that they are going to lease out the home they are currently living in. Ask them to consider the areas that are at risk of wear, tear and/or damage by a tenant and to recommend preventive measures. This would work well as a discussion board discussion. |
|---|---|
| Step 6: Analysing the cost benefits of property improvements. | The main part of this step involves the learner looking at scenarios involving Brett Feakes and Margot Davis, two investment property owners that are looking to sell in a few years’ time but are currently leasing their properties. We see Brett and Margot now, then revisit them in three years’ time. We discover that Brett took some poor advice, undertaking property improvements that do not result in an improvement in the property’s value. Margot receives good advice and takes a number of measures that result in a good market value for her property three years later.  

A debrief of these scenarios via a discussion board discussion would be worthwhile. |

On page 2, the learner is presented with a scenario in which Rick Hamilton was handling a mortgagee sale. We see Rick talking through some enhancement measures he suggests after doing a property inspection. You could debrief this scenario via a discussion board discussion.  

The content of this section is similar to that presented in the unit Market Property (Sales Stream) so you could refer learners to that section of the Training Manual if revision or more information is required.

This step explains the concept of a cost benefit analysis and its relevance to the property report.
### Step 7: Compiling and presenting the property report.

Explanation of what should be included in the property report and suggests strategies to ensure that you communicate the report’s contents clearly to clients.

This section is fairly brief, consisting mainly of an interactive drag and drop exercise in which learners are required to decide which (from a selection presented) documents need to be included in a property report.

Each document is linked to an example, and feedback is provided. This is a good interaction to use for revision on the key areas covered in previous steps.

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**Preparing learners for the resources**

If you choose to do discussion forum/discussion board exercises, you will need to set up discussion threads prior to commencing the activity. You will also need to advise learners of these requirements since instructions are not included in the Toolbox content. You should also encourage learners to use the discussion board to ask for assistance if they are unsure of where to find a resource. You may need to provide instructions to the learners on how to use communication tools such as e-mail, discussion board or chat.

Strongly encourage learners to work through the orientation before they begin working on the Toolbox, so they can familiarise themselves with the resources used in this activity.

You may choose to ask learners to gather relevant legislation/regulations, agency/industry guidelines etc prior to starting this unit, alternatively you can provide these resources for them.

**Other related resources or activities**

There is a lot of commonality between elements of this unit and PRDRE37A / 32A in the Property Management Stream. Some content such as enhancement measures and the Comparative Market Analysis process are covered more thoroughly in units within the Sales Stream.

If your learners are completing all the units in this Toolbox, you could consider modifying your delivery of Present and Explain Property Reports to avoid repetition.

**Ways of customising the resources**

PDF and Word documents/forms can be replaced with industry examples. You can change and/or add to the information presented in the Building Styles and Construction Techniques books by accessing the source files and changing the text or graphics.
Ways of promoting collaboration between learners

There is a lot of potential for interesting discussion on the points covered in this unit. The suggested activities outlined previously for this unit would work well if structured in teams or pairs.

If you are delivering all the units in the Toolbox, you could consider facilitating the task in this unit as a group activity and/or discussion rather than a structured, formal task. This task would also work well as a way of encouraging reflection on the content of previous units in the Sales and/or Property Management streams as it encompasses a lot of the same competencies, skills and knowledge.

Customising the product for different audiences

If learners have a prior knowledge of the subject, they could be directed not to work past level 1 or 2 as a way of providing more self-directed learning and a higher level of challenge. The links to levels 2 and 3 could be disabled if you wish to enforce this.
Effectively Manage Property and Account to Landlord (Property Management stream)

Unit of competence covered:

**Unit PRDRE17A – Effectively Manage Property and Account to Landlord**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Negotiate with landlord strategies for maximising annual rental returns</strong></td>
</tr>
<tr>
<td></td>
<td>1.1 Landlords are kept accurately informed of rental market figures and market expectations</td>
</tr>
<tr>
<td></td>
<td>1.2 Rental returns are negotiated with lessors in relation to market changes and expectations</td>
</tr>
<tr>
<td></td>
<td>1.3 Agreed adjustments to rental charges are made and reported to landlord</td>
</tr>
<tr>
<td>2</td>
<td><strong>Plan for and manage tenancy renewals</strong></td>
</tr>
<tr>
<td></td>
<td>2.1 Property is inspected and an accurate report produced on property conditions and maintenance requirements</td>
</tr>
<tr>
<td></td>
<td>2.2 Property condition reports and rental details are provided to tenants prior to tenancy renewal</td>
</tr>
<tr>
<td></td>
<td>2.3 Tenancy renewal agreement is negotiated and conditions agreed to by all parties</td>
</tr>
<tr>
<td></td>
<td>2.4 All tenancy renewal documentation is prepared and provided to tenant and finalised according to legislative and agency guidelines</td>
</tr>
</tbody>
</table>
### Purpose of activity

This unit covers market reviews and management of tenancy renewals. Learners will learn about:

- negotiating with landlords and tenants on rental rates,
- maximising rental returns,
- identifying appropriate rental rates according to the market conditions,
- plan for and manage tenancy renewals,
- manage financial arrears, and
- reporting and accounting responsibilities.

### Underpinning knowledge and skills

- Local property knowledge.
- Knowledge of agency procedures.
- Relevant legislation.
- Functional literacy and numeracy.
- Accuracy in print-based and computer-based record-keeping and data management, in relation to property management.
• Time management and work organisation, including problem solving in relation to performing and recording property management activities and transactions.
• Interpersonal communication skills in relation to performing and recording property management activities and transactions.
• Team work in relation to performing and recording property management activities and transactions.

**Summary of activity**

There is one task in this activity. The learner is required to follow the 4 steps involved in the processes relating to this unit:

1. **Negotiate with landlord strategies for maximising annual rental returns.**
2. **Plan for and manage tenancy renewals.**
3. **Manage rental arrears to minimise financial loss to lessors.**
4. **Account to landlord on a regular basis for rental moneys collected.**

The task introduces Mr Patrick Hayes who has a property in Sea View that he is considering putting up for lease. The learner is required to prepare a written response outlining what the current rental market is like in Sea View, current market trends and expectations for the long-term (2-3 years) future, what weekly rent you expect would be achievable for his property, what accounting reports you will provide, and their frequency, and their strategy for managing tenancy renewals and minimising any losses such as rental arrears and vacancy.

**Special features**

Blank forms are available in Microsoft® Word document format via the Briefcase. This gives learners the flexibility to complete them using a word processor, or to print them out and complete them by hand. Sample completed forms are in PDF format.

**Challenge**

This unit should be completed in conjunction with practical experience in property management operations.

This is a fairly straightforward unit that builds on previous learning in other units within the Property Management stream. The most complex aspect may be deciding on an appropriate rental price for Mr Hayes’s property, however the REIBS property database contains details of over 20 homes for rent in Sea View with which to compare the subject property.
Assessment suggestions

In completing this unit, learners will complete a range of documents and agreements based on events and details provided in the task. These documents can be submitted as part of a portfolio of evidence for assessment. Learners can also be assessed in their participation in discussion board or chat discussions (if these facilities are used in teaching this unit).

Alternative approaches and suggested collaboration activities

The following information relates to the four sections of the Effectively Manage Property and Account to Landlord Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

| Step 1:                                              | You could use this information as a platform to encourage learners to explore the rental market in their own area. Learners can also be directed to articles (in industry journals, Real Estate Institute websites, or in the newspapers) about cycles in the real estate industry and the potential of these cycles to affect property and rental prices in their area. Ask learners to articulate their understanding of the factors that affect rental prices in their area. Learners could be asked to summarise points and share them on the discussion board. You could also ask learners to research recent fluctuations in the rental market, and discuss reasons why this can occur.
| Negotiate with landlord strategies for maximising annual rental returns. |
| This step focuses mainly on the process of determining the optimal rental price for a property. It follows a similar strategy to that of completing a Comparative Market Analysis for the sales process. |
| Fixed-term and periodic tenancies are explained. | If you wish to add some extra challenge or activity, you could provide examples of ‘real’ properties advertised for rent and ask learners to comment on the variation between rental prices, or compile a list of features that can influence rental prices (eg close to beach, pool etc). |
You could set up a challenge via the bulletin board where learners post up details of a REAL rental property (eg one that was advertised in their local paper) and others have to “guess” how much it was rented for.

**Step 2:**
Plan for and manage tenancy renewals.

>This explores strategies that a property manager can take to plan for and manage tenancy renewals and/or vacancies.

Chances are that some of your learners have rented a property or two in their lifetime, so you may be able to use their experiences in renewing leases etc to create an interesting discussion for this step.

There is quite a bit of information in this step that relates to the Residential Tenancy Act legislation, so you may need to ensure that learners are working with information relevant to their own State/Territory rather than the examples provided for Blue Sky City.

**Step 3:**
Manage rental arrears to minimise financial loss to lessors.

>A property manager needs to manage potential financial losses in a proactive fashion. This step highlights the main risks in relation to financial loss in a rental property situation.

The subject of rental arrears reports is raised here, which may provide you with an opportunity to ask learners to post up examples of arrears reports from their agency, or to discuss what processes are in place at their agency to identify rental arrears and take appropriate action/s.

There is quite a bit of information in this step that relates to the Residential Tenancy Act legislation, so you may need to ensure that learners are working with information relevant to their own State/Territory rather than the examples provided for Blue Sky City.

**Step 4:**
Account to landlord on a regular basis.

>This step explores the various accounting and reporting responsibilities for a property manager.

This is a very simple step with not a lot of content.

You should consider asking learners to discuss the types of reports offered by their agency, and the processes followed – eg; do they report fortnightly or monthly?
Preparing learners for the resources

The tasks and resources provided in this unit require facilitator support – you may be required to guide learners to find the Residential Tenancies Act or Regulations for the State or Territory in which they are completing the course. Learners will be using this Act/Regulation as their primary legal reference when completing the task.

If you choose to include collaborative or discussion board activities, you will need to set up topics for research or discussion prior to commencing this unit, and inform learners to the requirements for these activities. If you are including role-playing sessions in this unit, you will need to organise specifics for the session: will the sessions be conducted in person, via the telephone, or using the Chat facility.

Encourage learners to work through the Toolbox orientation before they begin this unit, so that they become familiar with the resources and the Virtual Realty setting.

Other related resources or activities

This unit links in with PRDRE22A Present and Explain Property Reports, PRDRE37A Perform and Record Property Management Transactions and PRDRE32A Maintain and Protect Conditions of Rented Properties.

- **PRDRE22A** Present and Explain Property Reports provides resources on property condition reports for both managed properties and properties for sale.
- **PRDRE32A** Maintain and Protect Conditions of Rented Properties also provides resources on property condition reports specific to managed properties.
- **PRDRE37A** Perform and Record Property Management Transactions looks specifically at the process of establishing an optimum rental price for a property.

Ways of customising the resources

You could replace the properties referred to in the tasks with those that more closely reflect the property market in your area. This will require customisation of the task’s parameters. You could also replace forms, documents, checklists and agreements used in this unit with those used in your training area or agency.

Customising the product for different audiences

Learners who have prior-knowledge of property management may opt to commence the tasks instead of working through the nine steps listed in the Training Manual.
Perform and Record Property Management Activities and Transactions (Property Management stream)

Unit of competence covered:

Unit PRDRE37A – Perform and Record Property Management Activities and Transactions

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Check in tenants and provide tenancy reports.</td>
<td>1.1 Correct procedures are followed and accurate and appropriate advice is provided to new tenants checking into property. 1.2 Pre- and post-tenancy reports are accurately produced according to agency guidelines and legislative record-keeping requirements.</td>
</tr>
<tr>
<td>2. Establish and maintain tenant/landlord documentation and files.</td>
<td>2.1 All relevant information from tenant/landlord is verified. 2.2 Tenant/landlord documentation is completed and filed according to agency procedures in secure files.</td>
</tr>
<tr>
<td>3. Prepare tenancy agreements in accordance with legislative requirements.</td>
<td>3.1 All tenancy documentation is clearly explained to the tenant. 3.2 Tenancy documentation is produced in accordance with legal requirements and agency policy.</td>
</tr>
<tr>
<td>4. Prepare managing agents agreements in accordance with legislative requirements.</td>
<td>4.1 All landlord documentation is clearly explained to the landlord. 4.2 Landlord documentation is produced in accordance with legal requirements and agency policy.</td>
</tr>
</tbody>
</table>
5. Record tenant/landlord transactions on agency database.

5.1 All verified transactions are accurately recorded on agency database as completely as possible.

5.2 Details of tenant/landlord information are regularly adjusted and updated to ensure reliable records are kept.

6. Receive, record and lodge security deposits (bonds) and rent.

6.1 All moneys are received and accurately recorded in agency files and documentation.

6.2 All security deposits are secured and forwarded to statutory authorities within specified timeframe.

6.3 Incident reports are followed up with appropriate personnel where necessary.

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**Purpose of activity**

This activity introduces learners to property management processes and operations. Learners will learn about:

- performing rental appraisals,
- Managing Agent’s Agreements (or managing authority) and Tenancy Agreements,
- the procedures for the lodging of security bonds and rent, and
- agency databases and strategies for effective and efficient management of database information.

**Underpinning knowledge and skills**

- Local property knowledge.
- Knowledge of agency procedures.
- Relevant legislation.
- Functional literacy and numeracy.
- Accuracy in print-based and computer-based record-keeping and data management, in relation to property management.
- Time management and work organisation, including problem solving in relation to performing and recording property management activities and transactions.
• Interpersonal communication skills in relation to performing and recording property management activities and transactions.
• Team work in relation to performing and recording property management activities and transactions.

Summary of activity

There are two tasks in this activity. The learner is required to follow the 7 steps involved in the property management process:

1. Meet the owners and analyse the property
2. Establish an optimal rental price
3. Identify any management procedures specific to the property
4. Completing the Managing Agent's Agreement
5. Tenancy applications and the Tenancy Agreement
6. Recording landlord/tenant transactions in the agency database
7. Receiving, recording and lodging security bonds and rent

Task 1 requires the learner to initiate a Managing Agent's Agreement with new clients: the owners of 3 Hodnett Mews, Kaluka. It covers Steps 1 to 4.

Task 2 requires the learner to initiate a Tenancy Agreement with the tenants who have successfully applied to take the premises. It covers Steps 5-7.

Special features

Blank forms are available in Microsoft® Word document format via the Briefcase. This gives learners the flexibility to complete them using a word processor, or to print them out and complete them by hand. Sample completed forms are in PDF format.

Challenge

This unit should be completed in conjunction with practical experience in property management operations. Learners will need to learn the mechanics of trust account software packages used in their training organisation or workplace while putting into practice database management strategies and procedures covered in this Toolbox unit. Learners should also be involved in the day-to-day creation and maintenance of client files in their training organisation or workplace.

The 'property management database' provided in this unit is a simulation of a basic database using the forms and features of a Microsoft® Excel spreadsheet workbook. This workbook does not accurately simulate the intricacies of an authentic trust account program, such as RETAS, but affords learners the opportunity to view the mechanics of such a database. Ideally, learners should also be able to access authentic property management databases and given some time and guidance on its operations. You might like to set up a file or card in such a database for learners to enter and update information that is presented in the two tasks.
A good portion of this unit also deals with communication skills, especially in relation to communicating with clients. Learners will benefit from the opportunity to view or participate in a meeting with clients.

**Assessment suggestions**

In completing this unit, learners will complete a range of documents and agreements based on events and details provided in both tasks. These documents can be submitted as part of a portfolio of evidence for assessment. Learners can also be assessed in their participation in discussion board or chat discussions (if these facilities are used in teaching this unit). Learners can also be assessed on their performances in workplace simulations or role-playing sessions which sees them interacting with ‘prospective clients’.

**Alternative approaches and suggested collaboration activities**

The following information relates to the seven sections of the Perform and Record Property Management Activities and Transactions Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

| Step 1: | You could use this information as a platform to encourage learners to explore the situations, regulations and legislation governing property management in their State or Territory. Refer learners to the Residential Tenancies Act or Regulation for their State/Territory, and request that learners identify points in the Act/Regulation that governs what they do as property managers. Learners could be asked to summarise points and share them on the discussion board.

Meet the owners and analyse the property.

*This examines the first meeting with the owners of the rental property and what should be covered in this meeting. The inspection of a property to determine all its attributes and identify any specific attributes that may require specific forms of management is covered. This step also includes information on the role and responsibilities of a property manager.*

Learners could inspect their own or a friend’s property with the view of identifying attributes that could affect the management of the property should the property be made available for rent. They could be asked to list the attributes and describe how each attribute will impact property management, and share their findings on the discussion board.
### Step 2:

**Establish an optimal rental price.**

*This explores how a rental price should be decided on, by comparing rental prices of similar properties in the area and analysing market trends.*

Learners could be encouraged to perform a rental appraisal on the property they analysed by comparing it with other rental properties on the market. Learners might search for similar properties in 'To Let' advertisements in newspaper classifieds, in their State or Territory’s Real Estate Institute website or in other commercial real estate websites.

Learners should be asked to justify the optimal rental price that they determine by referring to specific elements that their property might share with other rental properties on the market. You might like to refer learners to the example of Elaine Chang determining the optimal rent price for Kerry McAllister’s property to help guide them in this task.

Learners can also be directed to articles (in industry journals, Real Estate Institute websites, or in the newspapers) about cycles in the real estate industry and the potential of these cycles to affect property and rental prices in their area. Ask learners to articulate their understanding of the factors that affect rental prices in their area.

### Step 3:

**Identify any specific management procedures specific to the property.**

*This step explores the different types of maintenance that a property requires and regular payments of things such as rates and levies that may need to be made.*

This is an ideal opportunity to set up a role playing session between a learner, playing the ‘property manager’, and a ‘client’. The client should prepare a set of conditions that they would like implemented as part of property management, and the learner will need to identify specific conditions that will affect the way the property is managed (such as fees, charges, and the management budget), and articulate how each condition will affect management. The chat room could be used for this.
Learners could also be asked to consider other conditions that can affect management and share their findings on the discussion board.

**Step 4:**
Completing the Managing Agent’s Agreement.

_This step explores all facets of the Managing Agent’s Agreement, which is a document that establishes all terms and conditions on which the management will operate. This covers the negotiation of all fees, prices and plans with the owner of the property to be managed._

While completing the actual agreement form is a technical task, much of the learner’s skill and capacity as a potential property manager can be gauged by their ability to complete the agreement and explain it to the client. You could set up another role-playing session, where learners are presented with a agreement (for example, the sample provided in this unit), and asked to explain it to a ‘client’. Elaine Chang presents a number of tips for successful client communication in this unit – learners may be asked to demonstrate their ability to put these tips into practice while they are interacting with the ‘client’. You could also challenge learners by setting up a ‘difficult client’ in the role-play – a client who refuses to repair damaged fixtures, or one who would like to implement practices which do not conform to legislative requirements.

This is also an opportunity for learners to articulate their understanding of legislation governing residential tenancies.

Learners can also be provided with short exercises to help them come to grips with interpreting ‘Legalese’. They should be encouraged to access the website which Elaine Chang refers to in her ‘tips for successful explanation’ to help them translate legal clauses.
<table>
<thead>
<tr>
<th><strong>Step 5:</strong></th>
<th></th>
</tr>
</thead>
</table>
| **Tenancy applications and the Tenancy Agreement.** | This section of the manual provides a brief checklist of strategies that a property manager can use to check the suitability of tenants. Use this opportunity to inform learners of other strategies that you may have used in the past. Anecdotal evidence goes a long way in providing ideas to learners. 
This is, again, a good opportunity for learners to demonstrate their ability to interact with clients. You could set up another ‘role-playing’ session, and have the learner as ‘property manager’ meet with the ‘tenant’ to complete the Tenancy Agreement. The learner will need to explain the elements in this agreement to the client, and articulate any special conditions for tenancy of the property. The chat room could be used to facilitate this. 
This is also an opportunity for learners to articulate their understanding of legislation governing residential tenancies. |

<table>
<thead>
<tr>
<th><strong>Step 6:</strong></th>
<th></th>
</tr>
</thead>
</table>
| **Recording landlord/tenant transactions in the agency database.** | Refer to the ‘Challenges’ section above for some ideas on how the tasks for this unit can be implemented using the property management database at the training organisation or workplace. 
Encourage learners to research the database used at their training organisation, its features and capabilities, and report back on the discussion board or via e-mail. 
Support for this section of the unit can be provided by demonstrating the use of a trust account program or database to learners, or organising for such a demonstration to be available to learners via provision of access to such software or training. |

*This examines how you should present a prospective tenant to a property and the tenancy application form that needs to be filled in. It also explores the Tenancy Agreement, which outlines the responsibilities of both parties.*

*This covers all the entries that should be made in the agency database once a Managing Agent's Agreement or a Tenancy Agreement for a property has been signed. This records future tenant or landlord transactions. Examples of database systems are also shown.*
| Step 7: Receiving, recording and lodging security bonds and rent. | Learners should also be given the opportunity to practice using the database. |
| This examines the acquisition of a security bond, using a bond lodgement form. The legislation associated with this and the use of trust accounts is explored. The procedures concerned with collecting rent are also covered. | Learners should be encouraged to refer to the Residential Tenancies Act or Regulation in their State or Territory for information on the limitations, time frames and procedures for lodging bond or rent monies. |
| Task 2 in this unit requires learners to summarise this information for their own reference. Learners may need some guidance as to where they may find the Act or Regulation relevant to their State/Territory. |
| Learners may want to try their hand at completing a Security Bond Lodgement form. |

### Preparing learners for the resources

The tasks and resources provided in this unit require facilitator support – you may be required to guide learners to find the Residential Tenancies Act or Regulation for the State or Territory in which they are completing the course. Learners will be using this Act/Regulation as their primary legal reference when completing the tasks.

If you choose to include collaborative or discussion board activities, you will need to set up topics for research or discussion prior to commencing this unit, and inform learners to the requirements for these activities. If you are including role-playing sessions in this unit, you will need to organise specifics for the session: will the sessions be conducted in person, via the telephone, or using the Chat facility.

Encourage learners to work through the Toolbox orientation before they begin this unit, so that they become familiar with the resources and the Virtual Realty setting.
Other related resources or activities

This unit links in with PRDRE22A Present and Explain Property Reports and PRDRE32A Maintain and Protect Conditions of Rented Properties.

- **PRDRE22A** Present and Explain Property Reports provides resources on property condition reports for both managed properties and properties for sale. Learners may be referred to the Training Manual for this unit to find out more about property condition reports and ways of producing and presenting them.

- **PRDRE32A** Maintain and Protect Conditions of Rented Properties also provides resources on property condition reports specific to managed properties. Learners may be referred to the Training Manual for this unit to find out more about property condition, and creating property condition reports.

Ways of customising the resources

You could replace the properties referred to in the tasks with those that more closely reflect the property market in your area. This will require customisation of the task’s parameters. You could also replace forms, documents, checklists and agreements used in this unit with those used in your training area or agency.

Customising the product for different audiences

Learners who have prior-knowledge of property management may opt to commence the tasks instead of working through the nine steps listed in the Training Manual.
Maintain and Protect Conditions of Rented Properties (Property Management stream)

Unit of competence covered:

**Unit PRDRE32A – Maintain and Protect Conditions of Rented Properties**

Related performance criteria:

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
</table>
| 1. Conduct regular property inspections. | 1.1 Tenants are informed of the agency and legislative guidelines for inspection of properties, and anticipated timelines for inspections are agreed in advance.  
1.2 Managed properties are thoroughly inspected at regular intervals according to agency guidelines, and any change to the property condition is discussed with the tenant. |
| 2. Analyse property condition with respect to market expectations and legislative requirements. | 2.1 Property is thoroughly inspected and condition is analysed against market expectations of normal wear and tear and legislative requirements for the maintenance of leased property.  
2.2 Discussion is held with the tenant as to the maintenance of the property and any repairs/replacements required under legislation.  
2.3 Negotiation is conducted with the property owner regarding repairs/replacements that are required under legislation or requested by the tenant and agreement reached on action to complete work. |
3. Monitor and manage contacts for ongoing maintenance to ensure compliance with legislation and maintenance of property condition.

<table>
<thead>
<tr>
<th>Subactivity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1</td>
<td>Accurate records are kept of contacts for property maintenance and repairs so that reliable work can be completed without delay.</td>
</tr>
<tr>
<td>3.2</td>
<td>Repairs and maintenance are managed in accordance with client’s instructions and agreed requirements for repairs/replacements, and according to legislation.</td>
</tr>
<tr>
<td>3.3</td>
<td>Reports of property condition are supplied to client to indicate conditions and expected maintenance requirements and to indicate completion of work.</td>
</tr>
</tbody>
</table>

4. Advise landlord on ways of protecting the asset value of property through systematically planned preventive maintenance programs.

<table>
<thead>
<tr>
<th>Subactivity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Landlord is advised by regular report of expected maintenance requirements and expenditure, so that property condition is prevented from unnecessary deterioration.</td>
</tr>
<tr>
<td>4.2</td>
<td>Accurate records of maintenance programs are kept up to date and the landlord regularly informed of property condition.</td>
</tr>
</tbody>
</table>

### Purpose of activity

This activity introduces learners to the processes involved in conducting inspections to ensure that the condition of rental properties is maintained. Learners will learn about:

- Property Condition Reports.
- Routine Property Condition Reports.
- Legislative requirements for inspections.
- Maintenance contractors.

### Underpinning knowledge and skills

- Principles of property management.
- Building styles and faults.
- Business and property law relating to the management of service contracts involving rental property.
• Agency policy and procedures.
• Residential tenancy legislation.
• Insurance needs for tradespeople.
• Communication skills: negotiation, problem solving, report writing.
• Property inspection and reporting on rented properties.
• Contracts management of rented property.
• Budgeting, costing and estimating in relation to rented properties.
• Records management for rented properties.
• Computer database and spreadsheet.

Summary of activity

There are two tasks in this activity. The learner is required to follow the 7 steps involved in the process:

1. Create a Property Condition Report and visit the rental property to conduct the Initial Property Inspection.
2. Write up the Property Condition Report.
3. Inform the tenant of the impending Routine Property Inspection.
4. Create a Routine Property Inspection report, conduct the inspection and write the report.
5. Compare the Routine Property Inspection Report to the Property Condition Report and prepare follow-up letters addressing any concerns.
6. Conduct the final inspection.
7. Find suitable maintenance contractors and arrange property maintenance.
8. Complete a Maintenance Report and follow-up any maintenance issues.

Task 1 requires the learner create conduct property inspections, write the inspection report and follow-up on any maintenance concerns. Step 1 and Step 2 require the learner to visit the rental property, conduct the initial inspection and write up the Property Condition Report. In Step 3 and Step 4 the learner is required to inform the tenant of the Routine Property Inspection, conduct the inspection and write up the report. In Step 5 both reports are compared and any issues are addressed. At the end of the tenancy the final inspection is conducted. This covers Steps 6.

Task 2 requires the learner to establish a maintenance contractor’s list, arrange maintenance for the property and address any concerns. It covers Steps 7.
Special features

The blank report forms provided throughout the unit are also available in Microsoft® Word document format via the Briefcase. This gives learners the flexibility to complete them using a word processor, or to print them out and complete them by hand. Sample completed forms are in PDF format.

Assessment suggestions

In completing this unit, learners will complete a range of reports, lists and letters based on events and details provided in both Tasks. These documents can be submitted as part of a portfolio of evidence for assessment. Learners can also be assessed in their participation in discussion board or chat discussions (if these facilities are used in teaching this unit). Assessment of the learners’ performances in workplace simulations or role-playing sessions which sees them interacting with ‘prospective tenants’ and ‘prospective contractors’ is another assessment option.

Alternative approaches and suggested collaboration activities

The following information relates to the eight sections of the Maintain and Protect Conditions of Rental Properties Activities and Transactions Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th>Step 1: Create a Property Condition Report and conduct the inspection.</th>
<th>You could use this information to facilitate a discussion on the advantages and disadvantages of each type of report. Learners could select their preferred report style and explain why they would use that style of report. You could also further discuss the importance of property inspections.</th>
</tr>
</thead>
<tbody>
<tr>
<td>The various types of Property Condition Report (PCR) are examined and the importance of the initial property inspection is discussed. Learners have the opportunity to listen to how a property manager describes the attributes of a property.</td>
<td>To elaborate further on the property inspection, you could display other photos of properties (interior and exterior), or unusual attributes and get learners to write a suitable description.</td>
</tr>
</tbody>
</table>
### Step 2:
Complete the report and distribute it.

*This examines the completed Property Condition Report and gives the learner the opportunity to describe various attributes. The rights and obligations of the tenant are also discussed.*

Learners could inspect their own or a friend’s property and complete a Property Condition Report. The rights and obligations of the tenant could be discussed further using the discussion board. The rights and obligations of the owner could also be introduced. Learners could be directed to websites that have information about the rights and responsibilities of the tenant and owner in their State/Territory.

### Step 3:
Inform the tenant of inspection.

*The legislative requirements of routine property inspections are introduced here and an example of the routine inspection letter is demonstrated.*

Learners should be directed to find the Residential Tenancies Act or Regulation, which will outline the legislative requirements for routine property inspections for their State or Territory. They may need some assistance in locating the documents. The differences and similarities in State/Territory legislation could be discussed via the discussion board or a chat session.

### Step 4:
Create a Routine Property Inspection Report, and conduct the inspection.

*This step looks at the Routine Property Inspection report and discusses the things to look for. Not only is the property manager looking to see if the tenant is maintaining the property but also if there is any maintenance that the owner may need to deal with.*

A discussion could be held about what to do if the tenant is not maintaining the property to an acceptable standard. Refer learners to REIBS (accessed via the Laptop) to read the archived article ‘Rental Disaster’. Learners could discuss what do in this situation and how it could have been prevented. Learners’ may know of ‘real life’ rental disasters that they can also discuss. If not, they should be encouraged to ask more experienced real estate agents for examples.
| **Step 5:** |  
|---|---|
| **Compare reports and address any issues with follow-up letters.** | ‘Real’ examples of disputes over the inspection reports that have occurred could be discussed and learners comment on how they could have been prevented.  

*This step compares the Property Condition Report to the Routine Property Report and looks at how to address any discrepancies.*  

Learner’s could research and compile a list or table of repairs and maintenance the tenant is responsible for and those that the owner is responsible for. For example: ‘Who is responsible for eradicating pests?’ A discussion board discussion could be set up to discuss the topic. ‘Who is responsible for urgent repairs?’ ‘Does the owner have to be notified before the repairs take place?’  

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| **Step 6:** |  
|---|---|
| **Conduct the final inspection.** | Further discussion on what constitutes ‘fair wear and tear’ could be held via the discussion board.  

*This step looks at the final inspection and the most efficient way to note variations. It explains what is meant by ‘fair wear and tear’ and the procedures for rectifying any problems identified at the final inspection.*  

A ‘role-playing’ session could be set up and have the learner as the property manager and they discuss with the owner about what is ‘fair wear and tear’, as it is up to the property manager to educate the owner on this issue.  

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| **Step 7:** |  
|---|---|
| **Find suitable contractors and arrange maintenance.** | This is a good opportunity for learners to demonstrate their ability to interact with maintenance contractors. You could set up a ‘role-playing’ session, and have the learner as ‘property manager’ meet with the ‘contractor’ to check their suitability as a maintenance contractor for the agency. The learner will need to explain the agency requirements to the contractor and articulate any special conditions. The chat room could be used to facilitate this.  

Learners could discuss the importance of documentation when contracting tradespeople to undertake maintenance at a property.  

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Preparing learners for the resources

The tasks and resources provided in this unit require facilitator support – you may be required to guide learners to find the legislation regarding property inspections for the State or Territory in which they are completing the course.

If you choose to include collaborative or discussion board activities, you will need to set up topics for research or discussion threads prior to commencing this unit, and inform learners to the requirements for these activities. Learners may also need instructions on how to use the communication tools.

Encourage learners to work through the Toolbox orientation before they begin this unit, so that they become familiar with the resources and the Virtual Realty setting.

Other related resources or activities

This unit links in with PRDRE22A Present and Explain Property Reports and PRDRE37A Perform and Record Property Management Activities and Transactions.

- **PRDRE22A** Present and Explain Property Reports provides resources on property condition reports for both managed properties and properties for sale. Learners may be referred to the Training Manual for this unit to find out more about property condition reports and ways of producing and presenting them.

- **PRDRE37A** Perform and Record Property Management Activities and transactions provides resources on the processes and operations of managing a rental property. Learners may be referred to the Training Manual for this unit to find out more about rental appraisals, the Managing Agent’s Agreement and the Tenancy Agreement.

Ways of customising the resources

You could replace reports, documents and letters used in this unit with those used in your training area or agency.

Customising the product for different audiences

Learners who have prior-knowledge of property management may opt to commence the tasks instead of working through the seven steps listed in the Training Manual.
Negotiate effectively with landlords and tenants *(Property Management stream)*

Unit of competence covered:

**Unit PRDRE31A – Negotiate effectively with landlords and tenants**

**Related performance criteria:**

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Interview landlords and tenants to establish needs and expectations at all stages of tenancies</td>
<td>1.1 Clear and open discussion is held with landlords and tenants to clarify questions and identify issues to be resolved</td>
</tr>
</tbody>
</table>
| 2. Communicate with landlords and tenants to reach a desired outcome | 2.1 Negotiation is completed on desired outcome, and agreements reached with landlords and tenants that are within agency and legislative guidelines  
2.2 As necessary, follow up communication or reports are provided to landlords and tenants to confirm any adjustments required to conditions of agreement |
| 3. Manage potential and real disputes between landlords and tenants | 3.1 Areas of dispute are analysed and evaluated according to agency procedures and market expectations to enable resolution of dispute  
3.2 Further negotiation and clarification of terms and conditions of lease of property is carried out until agreement is reached to the satisfaction of all parties |
Purpose of activity

This activity introduces learners to types of disputes that can arise in a property management context and highlights the importance of negotiation and communication in the property manager/client relationship. Legislative elements are also explored.

Underpinning knowledge and skills

- Local property knowledge.
- Knowledge of agency procedures.
- Functional literacy and numeracy.
- Accuracy in print-based and computer-based record keeping and data management.
- Time management and work organisation, including problem-solving in relation to landlord and tenant problems.
- Interpersonal communication skills.
- Team work in addressing landlord and tenant problems.
- Negotiation skills.

Summary of activity

There is one task in this activity. The learner is required to follow the 5 steps involved in the process:

1. Interview landlords and tenants.
2. Complete negotiation and reach agreement.
3. Follow up and confirm details.
4. Analyse and evaluate disputes.
5. Manage and resolve disputes.

The task puts the learner in the role of a property manager dealing with a potential dispute between a landlord and tenant. The dispute centres around some damage to the property caused by a guest at a party held by the tenant at the property.

The learner is required to analyse the situation and identify the appropriate course of action, based on the Residential Tenancy Act and/or other relevant legislation and guidelines.

Detailed below are some suggested answers for the task, however some details may differ according to State/Territory legislation and individual agency practices.
To deal with the situation at the rental property, you would need to:

- Advise the tenant that she is responsible for the damage, since a person whom she had invited to the property incurred it. (NOTE: if you wish to add some complexity to the task, you could interject later and add a new dimension to the story – Jody now claims that it was a gate crasher, not somebody whom she invited, that broke the window.)
- Give her 14 days to repair the damage, at her own expense.
- Send Jody a letter with this advise in writing, keeping a copy on file.
- Advise the landlord, also putting it in writing and keeping a copy on file.
- If Jody doesn’t carry out the required repairs in the 14 days:
  a. Obtain a quote for the repairs and deliver it to the tenant with a letter stating that she is required to pay the amount. Keep a copy of the quote and letter on file and advise the landlord (in writing) of the action being taken.
  b. Organise for the repairs to be done and send the invoice to the tenant, with a letter requesting payment within 14 days and keep a copy of all this on file. Advise the landlord (in writing) of the action being taken.
- If Jody fails to pay the amount in the required time, organise an order to pay – this should be delivered in person or sent via registered post. A copy must be kept on file.

**Special features**

The Training Manual for this unit contains several examples of letters that Virtual Realty send to tenants and landlords – these could be helpful to students during the task.

**Assessment suggestions**

In completing this unit, learners will complete a range of reports, lists and letters based on events and details provided in the task. These documents can be submitted as part of a portfolio of evidence for assessment.

Learners can also be assessed in their participation in discussion board or chat discussions (if these facilities are used in teaching this unit). Assessment of the learners’ performances in workplace simulations or role-playing sessions which sees them interacting with tenants and landlords in a dispute is another assessment option.

You may also need to consider modifying this unit in some way if your learners are also doing PRDRE32A and PRDRE37A as there is some overlap in the competencies across the 3 property management units. It may be appropriate to design a holistic assessment that covers the three units.
### Alternative approaches and suggested collaboration activities

The following information relates to the five sections of the Negotiate effectively with landlords and tenants activities and transactions Training Manual.

NOTE: Collaborative activities could be allocated to all learners within your group, or you could elect to split the group into teams or pairs and allocate specific tasks to certain individuals or teams.

<table>
<thead>
<tr>
<th><strong>Step 1:</strong></th>
<th><strong>Step 2:</strong></th>
</tr>
</thead>
</table>
| **Interview landlords and tenants.**  
*This step highlights the importance of communicating with landlords and tenants at all stages – pre, during and post tenancy. Common issues are discussed.* | **Negotiation is completed and agreement reached.**  
*In this step, legislation is discussed in the context of property management issues that are not negotiable, such as those covered by legislation. Scenarios of poor property management practice are presented, and legislation is explained.* |
| There is an interaction here where learners meet some of Elaine’s landlords and tenants – looking at their needs and expectations. You could facilitate a discussion on what sort of ‘strange’ needs and expectations learners have come across, or needs and expectations that have.  
To elaborate further on the property inspection, you could display other photos of properties (interior and exterior), or unusual attributes and get learners to write a suitable description. | Here we meet Tyler Bowen, a property manager at Rogue Realty. Tyler’s handling some property management problems in a less than professional and/or legal way. You could invite learners to submit an alternative version of these scenarios – what should Tyler have done instead? This could work well in pairs or groups – assign a scenario each.  
On the REIBS website, a document titled ‘About Your Residential Tenancy Agreement’ is provided. This is designed to give an overview of the main elements of an RTA, however you may need to supplement this with further information, or State/Territory specific details.  
There is an interaction on page 2 of this step that provides links to |
websites in each State/Territory where learners can find relevant legislation.

On The differences and similarities in State/Territory legislation could be discussed via the discussion board or a chat session.

On page 3, we see Tyler Bowen again getting into trouble for not following legislative guidelines. You could invite discussion on this scenario via the bulletin board.

Elaine presents some of her experiences with non-negotiable issues. You could take one (or more) of these and explore it in more detail via discussion or role-play, or set up pairs/groups to discuss each of Elaine’s points in more detail.

| **Step 3:** Follow up and confirm details. | You could invite learners to add to the list presented on page 2 of this step. |
| **Step 4:** Analyse and evaluate disputes. | There is much room for discussion here – you could introduce a case study and invite learners (in pairs, groups or individually) to analyse and evaluate the dispute in your case study and discuss the issues involved. |
|  | If your learners are at an agency, you could invite them to submit a dispute they have handled and invite discussion on its analysis and evaluation. |

*This step explains the importance of following up and carrying out required actions, and keeping detailed records of what has been negotiated and agreed. Examples of relevant documentation are provided.*
Step 5:
Manage and resolve disputes.

In this final step, the management and resolution of disputes is covered. Legal proceedings are explained, in the event that a dispute cannot be resolved at agency level.

This step may benefit from the addition of information specific to the learners’ State/Territory or agency guidelines.

On the last page of this step, Elaine explains how disputes are handled through the courts at Blue Sky City. It may be valuable at this point to ask learners to research the legal procedure that applies in their State/Territory.

You may be able to locate the transcript of court proceedings for a tenancy dispute. However, these are often lengthy and difficult to follow so you could consider giving learners a case study to look at and discuss the process of managing and resolving disputes.

Preparing learners for the resources

The tasks and resources provided in this unit require facilitator support – you may be required to guide learners to find the legislation regarding tenancy disputes for the State or Territory in which they are completing the course.

If you choose to include collaborative or discussion board activities, you will need to set up topics for research or discussion threads prior to commencing this unit, and inform learners to the requirements for these activities. Learners may also need instructions on how to use the communication tools.

Encourage learners to work through the Toolbox orientation before they begin this unit, so that they become familiar with the resources and the Virtual Realty setting.
Other related resources or activities

This unit links in with PRDRE32A Maintain and protect conditions of rented properties and PRDRE37A Perform and Record Property Management Activities and Transactions.

- **PRDRE32A** Maintain and protect conditions of rented properties provides resources on property condition reports, property inspections and negotiating issues with and/or between landlords and tenants. Examples of relevant forms and letters are provided.

- **PRDRE37A** Perform and Record Property Management Activities and Transactions provides resources on the processes and operations of managing a rental property. Learners may be referred to the Training Manual for this unit to find out more about rental appraisals, the Managing Agent’s Agreement and the Tenancy Agreement.

Ways of customising the resources

You could replace reports, documents and letters used in this unit with those used in your training area or agency.

Customising the product for different audiences

Learners who have prior-knowledge of property management may opt to commence the tasks instead of working through the seven steps listed in the Training Manual.

You may also need to consider modifying this unit in some way if your learners are also doing PRDRE32A and PRDRE37A as there is some overlap in the competencies across the 3 property management units.