

The Saskatchewan Association of the Appraisal Institute of Canada gratefully acknowledges Dwight Percy and BDC Consulting Group for their efforts to facilitate, create, and provide us with an electronic copy for distribution to our membership.

## Pre-Strategic Planning Survey Results

*The following survey was sent to meeting participants prior to the planning session. The purpose of the survey was to collect some of the views and perceptions of those most involved in the Association. The survey was utilized during the planning meeting to ensure key issues were addressed.*

***In the past year or two, what worked the best, or what were the most important activities or successes of your Association?***

- The last two conferences were great improvements over prior years.
- Marked improvement in the quality and content of seminars and conferences – timely and relevant topics.
- Annual conferences, which provide education seminars necessary for recertification credits.
- Collaboration of members.
- Member support for higher dues despite limited services.
- Annual meetings fairly well supported.
- Limited professional development program has had support.
- Having an Executive Director to focus more intently on member services.
- Secured the services of a dedicated and well-qualified Executive Director.
- Incorporation of a strategic planning process at the Association level.
- Movement towards more long-term financial stability.
- The Association for the most part succeeded in providing various professional development activities.
- Almost all courses offered by the Association itself were relevant to the day-to-day affairs of a Saskatchewan appraiser.
- Quarterly newsletter made members aware of a large number of courses offered by affiliated organizations.
- Association was actively involved with ensuring that voting rights at the provincial level would be “according to Provincial By-laws”.
- By allowing the younger (newer) members to vote, they can have a say in the future of the Association.
- Have established a well-run provincial office.
- Have cut our operating costs to the bone to keep within our budgets.
- Provided the membership with the confidence that we will, to the best of our abilities, address their concerns or solve their problems.
- Have been successful in obtaining members involvement on specific tasks/undertakings on an individual project basis where the member knows his time involvement will be short.

• **In the past year or two, in which areas have results not met your expectations? Is there a particular initiative the Association did not undertake that it should have?**

- The last two years have been spent pretty much maintaining the status quo.
- Very few initiatives have been undertaken.
- Public Relations of our profession has been one of the weakest areas. (3)
- Peer Review should be further explored.
- Defining “consulting services” has also not been done



*of*  
*n.*

*vi-*

l

g

or

ect

**s?**  
**ld**



- Peer Review should be further explored.
- Defining “consulting services” has also not been done.
- Obtaining participation by, or from the general membership.
- Have a hard time determining what the membership’s requirements and/or expectations are.
- Association should become more involved in promotion of our profession.
- Aid members in breaking barriers with organizations we rely on for information e.g. SAMA, Land Titles, and Real Estate Boards.
- Drafting of a marketing plan.
- Getting more involvement of members at the committee level and at the provincial Council/ Executive level.
- Inability to bring fee and non-fee members closer together for the good of the Association.
- More professional development opportunities needed. (2)
- Not enough formal and informal opportunities to meet and network with members.
- Not enough promotion of members.
- Canadian Standards seminar in Saskatoon.
- 
- **If you were to choose ONE major accomplishment for the next year, what would it be?**
- Recruitment of new members. (2)
- Intensive professional development courses.
- Improving service and assistance to students so they do not feel left in midstream.
- Association should be a focal point of a Property Institute initiative, bring together various groups to provide a critical mass sufficient to support quality programs.
- More attraction of new entrants into the professional appraisal services field.
- Drafting of a comprehensive marketing plan.
- Communicate to members, potential members, clients and potential clients exactly what services appraisers provide.
- We have established a hierarchy for the Association, whereby we know someone will be in line for the presidency, and/or NGC. Representative. In the past we had to beg someone to take on these two roles and parachute them into the position without any chapter, provincial or national Association experience.

**1. What do you see as the focal point of the Association’s mandate, or what is its prime “reason for being”?**

- Professional development. (3)
- Facilitate interaction/networking among members. (2)
- Promote the profession. (3)
- Promptly delivering AIC services to members.
- Promoting all members and membership.
- Serve membership.
- Membership services.
- Administer and manage the business at the Association.
- Liaison between members and other organizations.
- The Association’s mandate is to service its members and to administer the Institute’s policies.
- To provide service to our membership on all subject matters.
- Recruitment of new members, Retention of existing members.
- Education.
- Recertification.
- Act as a liaison between AIC’s National Office and the provincial members.

*Note: responses with a (#) behind indicates more than one person provided the same response to the*

— | | —

|

a

ro-

-  
ute

ts

— | | —

*Note: responses with a (#) behind indicates more than one person provided the same response to the question.*

## **Background Issues to the Strategic Plan Update:**

The group identified the following as the overriding or key issues to be addressed in the Plan Update:

- Member Services:
  - Measurements of effectiveness
  - Professional development
  - Networking
  - Processes for providing services
- Internal communications:
  - From the Association to members
  - From members to the Association
- External Communications:
  - Communication with the public to enhance public image
  - Affiliations
- Financial (given that the Association is already part way through their financial year) it was apparent that substantial financial decisions would be best made prior to the end of 2001. The plan herein is; therefore, one that maintains the “financial status quo”.
- Fees and licensing (forwarded to future discussions)

*The above issues were discussed, incorporating the following Strengths, Weaknesses, Opportunities and Threats (SWOT), as background. Consideration of the SWOT issues ensures that the strategies and actions determined are “reasonable and possible”.*

## **SWOT Analysis**

### **Challenges, Weaknesses and Threats to the Organization**

- Small membership numbers that have declined:
  - Membership was 192, but as at today, membership is 163.
  - Concern was expressed about the number of members who will retire.
  - Demographics and labour shortage will hamper the recruitment process.
- Changing marketplace for appraisers:
  - Increased expectations placed on appraisers.
  - Market demands for increased quality and service, while downward pressure exists on fees.

• Changing business models:

— | | —

'e

•

nt  
s;

— | | —  
— | | —

- Changing business models:
  - Increased incidence of low contract fees to individuals performing appraisal services, which decreases the ability of companies to allow individuals to article.
- Lack of cohesiveness within the industry:
  - 50/50 split between fee based members and public institution members.
  - Varying degrees of willingness to share information.
- Loss of chapter's decreased ability to share information between Association members.
- The image of appraisers, and the value they provide, is an issue:
  - Within the industry.
  - With the public, and outside the industry.
- Loss of a feeling of connection with the National office.
- Financial resources of the Saskatchewan Association are limited.

## **Opportunities and Strengths of the Organization**

- Opportunities for specialization are greater than in the past.
- Partnership and alliance opportunities have increased.
- Computerization presents a number of new opportunities.
- The depth of knowledge of industry participants and the range of services they provide has increased the value of the appraisal sector.
- New members have provided new perspectives and have reflected new market realities.

# **Strategic Plan Update 2001-2002**

## **1) Member Services**

### **a) Service Delivery Effectiveness Issues**

***i) Note:***

There is concern that a number of members are totally unaware of what the national and provincial Associations do, and what the national and provincial Associations provide in the way of services.

***ii) Note:***

— | | —

h

sed

r-  
of

— —  
— —

**ii) Note:**

One of the key issues revolves around the fact that the National Association does not effectively communicate the following:

- (a) Who is responsible for providing specific services?
- (b) How those responsibilities have changed.

**iii) Note:**

As a result, there is a perception that members believe response from the National Association is too slow.

**iv) Note:**

There is also a perception that some members believe the same to be true of the provincial Association.

**v) Recommended Action:**

The National Association should list areas of responsibility, the sources of information, and changes undertaken within the organization on its web site, so as to create maximum ease of access for members.

## **b) Measurements of Service Delivery Effectiveness**

**i) Note:**

It is believed the following typify perceptions of service effectiveness:

- (a) Responsiveness to member needs.
- (b) Speed of responses.
- (c) Completeness of answers.

**ii) Action:**

The Association must increase and enhance its service delivery in the above areas.

## **c) Professional Development**

**i) Note:**

Seminars are currently held twice per year, focusing on professional development for members. There is concern, however, that members do not perceive professional development as being "as high on the agenda" as the Association places it.

**ii) Actions:**

- (1) Rename the Annual General Meeting to be "Professional Development Week."
- (2) Proceed with the Fall 2001 session on Communications Strategies.
- (3) Assess topics from the telephone survey process (described in Section 2 c) and provide the information to the Professional Development Committee by July 31, 2001.

## **d) Networking**

**i) Note:**

Because the local chapters no longer exist, the only substantive opportunities for networking,

— | | —

ly

is

so-

of

-  
as

3

— | | —  
— g, —

*i) Note:*

Because the local chapters no longer exist, the only substantive opportunities for networking, particularly for students, is the Annual General Meeting. It is important for members to know who the students are, and it is important for those who are newer to the appraisal industry, in particular, to know who all members are.

*ii) Actions:*

- (1) Put all member names on the Association website.
- (2) Include all notes on designations on website listing.
- (3) Have this action completed by June 30, 2001.

*iii) Note:*

Again, the dissolution of the chapter format has made it more difficult for some members to network, although for members outside Saskatoon and Regina, this is not a new issue. It is deemed very important to create a networking format that includes members in all geographic areas of the province.

*iv) Actions:*

- (1) Arrange meetings through existing, committed Association members with other members, by geographic areas.
- (2) Have each of six members (including Gerard, Pete, Larry, Bruce, Rick) pre-arrange meetings with at least five other Association members who live in a particular geographic area when they are in that area on business.
- (3) Report to the Association office, in brief format, the following:
  - (a) Names of those who attended.
  - (b) Issues raised by members.
  - (c) Quotes or comments that can be used to communicate to other members through the newsletter.
- (4) Complete these meetings by December 31, 2001.

## **e) Membership Recruitment**

*i) Note:*

It was strongly agreed that, at this time, membership retention is the overriding goal. While new members would certainly never be discouraged, it was agreed that member services, member networking and member involvement are the first priorities, before any significant membership recruitment process is initiated.

## **2) Internal Communications**

### **a) Survey Requirements**

*i) Note:*

There was general agreement that internal communications improvement is required. At present, the 8-page newsletter is published and mailed four times per year. As well, the Internet site, which is new, is available for member communications. In general, however, it was

g,  
ow  
in

o

nic

s,

st-  
rea

,

,

e-  
let

sent, the 8-page newsletter is published and mailed four times per year. As well, the Internet site, which is new, is available for member communications. In general, however, it was agreed that innovative mechanisms for increasing member interest and member involvement are critical to having members utilize the information provided through these written formats. In addition, the Actions recommended under the Networking and Professional Development sections will enhance the effectiveness of the internal communications process.

***ii) Action:***

Include the following topics in outgoing member communications:

- (1) Promote opportunities for members such as jobs and candidate information
- (2) Ties to other organizations
- (3) Share success stories
- (4) Communicate opportunities to network
- (5) Include the "Problem of the Month"
- (6) Include Alberta and Manitoba issues
- (7) Share information about the National office
- (8) Shift the membership from "print and mail" to e-mail distribution of the newsletter.

***iii) Note:***

Traditionally, surveys have produced very low response rates when the topic area is broad or generic. Response rates on more specific issues, such as Professional Development topics, tend to be better.

***iv) Action:***

Focus future surveys on specific topic areas.

## **b) Volunteer-Executed Survey Process**

***i) Note:***

As part of a comprehensive revamping of the communication process that is both staff-driven and volunteer-driven, the following was agreed to:

***ii) Actions:***

- (1) Implement a telephone survey process that will be executed by volunteers.
  - (a) Identify 10 members to be contacted by each of two volunteers.
  - (b) Have Gerry and Rick undertake the contacts.
  - (c) Recap the results and report to the Executive Committee for review.
  - (d) Report the process, the issues and the results in the next newsletter.
- (2) Determine, based on results and benefits obtained, whether to continue this process.

## **c) Staff-Executed Survey Process**

***i) Note:***

After a great deal of discussion, and a review of a number of options, given the importance of the internal communications area of operations, the following actions were agreed as vital to the Strategic Plan for the upcoming year. The actions below are intended as a test of implementing the survey as an ongoing process.

— | | —  
iet

t  
ts.  
t

or  
,

en

: of  
o  
2-  
— —  
— —

menting the survey as an ongoing process.

**ii) Actions:**

- (1) Implement a telephone survey process that will be executed by the staff.
  - (a) Shift some of the Executive Director's duties to enable her to undertake 25 telephone survey calls.
    - (i) Determine the names of the members who will be recipients of the telephone survey to be decided through agreement between the Executive Director, the Chair of the Public Relations Committee, Gerry and Rick.
  - (b) The topics for the telephone survey are to include:
    - (i) Professional Development topics that would attract members.
    - (ii) Concerns about the Association.
    - (iii) Actions that should be taken by the Association.
    - (iv) Problems and key issues within the industry.
    - (v) E-mail usage status and e-mail addresses.
  - (c) Recap the results and report to the Executive Committee for review.
  - (d) Report the process, the issues and the results in the next newsletter.
  - (e) The process is to be completed by June 30, 2001.

### 3) External Communications

#### a) Communications With the Public

**i) Note:**

It was generally agreed that the positioning and understanding of the appraisal industry is not well understood and that the value of appraisal work is not appreciated or valued to the extent it should be.

**ii) Note:**

Some attempts to communicate the value of role of appraisers have been undertaken in the past. However, these have not been as consistent as required, and the results of such efforts are not known.

**iii) Action:**

Make the video, if still appropriate, available to communities in which it can be played on a local programming channel, and have the impact assessed by members in that area.

**iv) Action:**

Assess the proposal being put forward by the national Association, which would see a very comprehensive program at substantial cost to members, during the next budget year.

**v) Note:**

Communication with the general public through the news media can be an effective method of outlining the role of the appraisal industry.

**vi) Action:**

Evaluate opportunities for non paid media communication of industry issues and/or Appraisal

— | | —

re

-  
of

cell  
t

it.  
not

cal

m-

— | | —

***vi) Action:***

Evaluate opportunities for non-paid media communication of industry issues and/or Appraisal Institute activities.

**b) Communications With Affiliate Groups and Organizations**

***i) Note:***

There are a number of industry, business and trade groups with which the appraisal industry interacts. These were deemed to be the primary targets for communicating information about the role and value of the appraisal industry.

***ii) Actions:***

- (1) Have the Public Relations Committee identify the ten most important groups for the Appraisal Institute to address:
  - (a) These groups might include Chambers of Commerce, Real Estate Boards, home builders Associations, Federal Government departments, Provincial Government departments, SAMA, and municipalities with their own assessment systems.
- (2) Develop a set of speaking notes, to ensure some consistency of message that can be used by each person delivering the message.
- (3) Have the addresses delivered by volunteers in the October 2001 to May 2002 time frame.

— | | —

-  
t

-

ld-

ed

ne.

— —  
— —



























