

PROJECT CHARTER
“THE FUTURE OF THE ASSESSOR/VALUER PROFESSION”

Project Information:				
Date	April 19, 2002	Project Team	Myron Chilibeck	AAA
			Charles Johnstone	REIBC
			Darwin Kanius	SAA
			Dan Diachun	AAOM
			Mark Doble	IMA
			Larry Laverty	AIC
	Administration	Debbie Ann Clark	AAA	

Background:	
Forum/Report	Report Highlights/Current State/Future State
Calgary Educational Symposium Presentation May 4, 2001	<i>What type of training is required by Assessors to fulfill current assessment functions?</i>
<i>Report to be prepared by IPTI and funded by Alberta Municipal Affairs.</i>	<i>What educational opportunities are available to assessors in Canada?</i>
	<i>Initial assessment of whether or not the current educational programs satisfy the requirements of the assessment/valuation community.</i>
Calgary Educational Symposium Presentation September 25, 2001	<i>Association Assessment Training in Canada has been developed to meet Accreditation requirements in each province.</i>
Highlights of IPTI Research	<i>Assessment Departments are re-designing the delivery of Assessment Services, therefore staff other than Accredited Assessors are required.</i>
Rationale: (why the concern?)	
Assessor/Valuer of the Future	<i>In Alberta, over 100 Assessors will be retiring in the next five to ten years. How will Associations attract young people into the profession?</i>
	<i>Are Associations developing Assessment Training to meet the demands of the “new Assessor/Valuer” in response to internal and external pressures?</i>
	<i>How will Associations attract and educate enough Assessors to fill the requirements of the Assessment Departments?</i>
	<i>What are the skills, knowledge and abilities required within an education program for Canadian Assessors/Valuers?</i>

PROJECT CHARTER
“THE FUTURE OF THE ASSESSOR/VALUER PROFESSION”

Purpose Statement:

The Interprovincial Professional Assessors’ of Canada (IPPAC), Appraisal Institute of Canada (AIC) and the Real Estate Institute of British Columbia (REIBC) will provide representatives to participate in an “Assessor/Valuer of the Future” Focus Group. International Association of Assessing Officers (IAAO) are represented through affiliate Canadian Association representatives. The Focus Group will research and report on the skills, knowledge and abilities required of the “Assessor/Valuator of the Future”. The Alberta Assessors’ Association has accepted the responsibility of Administration for this Focus Group.

It is recognized that future recommendations in regards to implementation will be required from this focus group, however they are not part of this project and will be developed as a separate future project.

Expected Outcomes:

Upon completion of this project, (through Membership surveys, discussion groups via broadcast email and teleconference) the focus group will:

Task	Accredited/Non-Accredited	Requirement
Identify <i>skills</i> required of Assessor/Valuer	Accredited Assessor	Standardized Core Education List
Identify <i>skills</i> required of Assessor/Valuer	Non-Accredited Assessor	Standardized Core Education List
Identify <i>knowledge</i> required of Assessor/Valuer	Accredited Assessor	Practice Review Standardized determination of Experience/Education/Equivalencies
Identify <i>knowledge</i> required of Assessor/Valuer	Non-Accredited Assessor	Practice Review Standardized determination of Experience/Education/Equivalencies
Identify <i>ability</i> required of Assessor/Valuer	Accredited Assessor	Short-term 1-5 years Long-term 5-10 years
Identify <i>ability</i> required of Assessor/Valuer	Non-Accredited Assessor	Short-term 1-5 years Long-term 5-10 years

Strategy	Partnership Initiatives	Timeframe
Identify strategy to meet the <i>skill</i> requirements	Educational Institutions	Short-term 1-5 years
		Long-term 5-10 years
	IPPAC (Umbrella Organization)	Short-term 1-5 years
		Long-term 5-10 years
	Assessment Offices	Short-term 1-5 years
		Long-term 5-10 years
	Other?	Short-term 1-5 years
		Long-term 5-10 years

PROJECT CHARTER
“THE FUTURE OF THE ASSESSOR/VALUER PROFESSION”

Expected Outcomes continued		
Strategy	Partnership Initiatives	Timeframe
Identify strategy to meet the <i>knowledge</i> requirements	Educational Institutions	Short-term 1-5 years
		Long-term 5-10 years
	IPPAC (Umbrella Organization)	Short-term 1-5 years
		Long-term 5-10 years
	Assessment Offices	Short-term 1-5 years
		Long-term 5-10 years
	Other?	Short-term 1-5 years
		Long-term 5-10 years
Identify strategy to meet the <i>ability</i> requirements	Educational Institutions	Short-term 1-5 years
		Long-term 5 –10 years
	IPPAC (Umbrella Organization)	Short-term 1-5 years
		Long-term 5 –10 years
	Assessment Offices	Short-term 1-5 years
		Long-term 5 –10 years
	Other?	Short-term 1-5 years
		Long-term 5 –10 years

Action Plan:
<i>Summarize research and prepare Power Point presentation for Calgary Educational Symposium Meeting on February 27, 2002, to meet reporting requirements noted in the Purpose Statement. (See attached Action Plan).</i>

Ground Rules:

<i>Will be developed separately and attached to the Project Charter.</i>
--

Distribution List:

Name	Organization	Email	Phone	Fax
Myron Chilibeck	AAA	myronc@city.red-deer.ab.ca	403-342-8124	403-342-8199
Charles Johnstone	REIBC	Charles.Johnstone@gems3.gov.bc.ca	250-638-1116	250-638-0156
Darwin Kanius	SAA	dkanius@city.moose-jaw.sk.ca	306-694-4476	306-694-4505
Dan Diachun	AAOM	ddiachun@city.winnipeg.mb.ca	204-986-2793	204-986-6105
Mark Doble	IMA	DOBLEMA@mpac.ca	705-324-1622	705-324-6852
Larry Laverty	AIC	larryl@woodbuffalo.ab.ca	780-743-7019	780-743-7999
Debbie Ann Clark	AAA, Admin.	dclark@assessor.ab.ca	780-483-4222	780-487-7505

PROJECT CHARTER
“THE FUTURE OF THE ASSESSOR/VALUER PROFESSION”

Project Charter Representative Agreement:

- Representatives will actively participate and meet Action Plan deadlines and commitments..*
- Representatives will be responsible to keep their respective Organization up to date on the work of the focus group.*
- Alberta Assessors' Association will forward information only to Focus Group Member.*
- Draft or Final will appear in the footer of the documents to designate current status of the document.*
- All Focus Group Representatives by signing this Project Charter agree not to forward the final report to other parties without approval of the focus group, until the report is published at the Calgary Educational Symposium on January 25, 2002.*

Name

Organization

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

DATED _____

PROJECT CHARTER
“THE FUTURE OF THE ASSESSOR/VALUER PROFESSION”

ATTACHMENT I

Action Plan:		
Date/Forum	Item	Action/Deadline
October 22, 2001/Email	Draft Project Charter/AP	AAA forwards to Representatives 10/22/01
October 23, 2001/Email/SAA Mtg	Draft Project Charter	Assign Association Representative 10/26/01
October 23, 2001/Email/SAA Mtg	Draft Project Charter	Review and Revise 10/26/01
October 23, 2001/Email/SAA Mtg	Draft Project Charter	Sign Off Charter 10/26/01
October 23, 2001/Email/SAA Mtg	Draft Action Plan	Review/Revise 10/26/01
December 20, 2001/Teleconference	Ground Rules	Brainstorm/Develop Rules, survey, report
October 23, 2001/SAA mtg	Approved Project Charter/AP	Admin. forwards to Representatives 10/31/01
December 20, 2001/Teleconference	Draft Member & Employer Surveys	Reps. Forward draft to Admin 01/02/02
December 20, 2001/Teleconference	Members & Employer Surveys Template	Admin. forwards to Representatives 01/10/02
December 20, 2001/Teleconference	Survey Results	Forward to Admin. 01/31/02
December 20, 2001/Teleconference	Survey Results Report	Forward to Representatives and PRC 02/11/02
December 20, 2001/Teleconference	Draft Power Point Presentation	Forward Outline to Representatives 02/22/02
	Teleconference may be required to prepare final report.	
December 20, 2001/Teleconference	Presentation of report at Calgary Educational Symposium	02/27/02 Presenter to be determined.

ATTACHMENT II

Ground Rules:

- 1.1 **Monetary Costs:**
 - 1.1.1 The representatives of the focus group agree to contact their Associations in regards to covering their portion of the costs associated with this project.
 - 1.1.2 Each representative will cover their costs of attendance at future Educational Symposiums related to this project.
 - 1.1.3 In the event that the AAA is billed for costs for representatives other than the AAA representative and administrator, the AAA will bill each representative’s organization.
 - 1.1.4 The focus group administrator will keep the representatives informed of the monetary costs of the project.
- 1.2 **Communication Format and Response Timeline:**
 - 1.2.1 The communication format for this project will be by email and teleconference.
 - 1.2.2 Representatives of the focus group are asked to respond to email requests within 48 hours unless otherwise specified in the email.

PROJECT CHARTER

“THE FUTURE OF THE ASSESSOR/VALUER PROFESSION”

- 1.2.3 If a representative is unable to respond within 48 hours, the representative agrees to contact the administrator with the desired extension to the response deadline.
- 1.2.4 If a response is required by a representative then the representative will be addressed in the “TO” line of an email.
- 1.2.5 If no response is required by a representative then the representative will be addressed in the “CC” line of an email.
- 1.2.6 For the purposes of this project only representatives of the focus group will be addressed in the “TO” line and IPPAC President’s will be addressed in the “CC” line only.
- 1.2.7 Use Outlook “plan a meeting” to contact representatives in reference to required attendance at meetings.