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An exploration of professional socialization in Pacific Rim property programs

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Abstract: Study and consideration of the professional socialization process has been instrumental in changing the way graduates are trained and how they are supported post graduation. This paper discusses the development and design of two surveys: one of property program director in the Pacific Rim and the second a sample of Australian graduates who have recently become full members of the relevant property professional body. The study of program directors focuses on awareness of professional socialization of valuers and how the development of graduates' professional socialization is accommodated at orientation and in subsequent years of their program. The study of graduate valuers explores their working experience and professional development post graduation and their preparedness to become accredited professionals. The paper presents preliminary findings from the two surveys.

1 Introduction

Professional socialization refers to the acquisition of values, attitudes, skills and knowledge pertaining to a professional subculture.

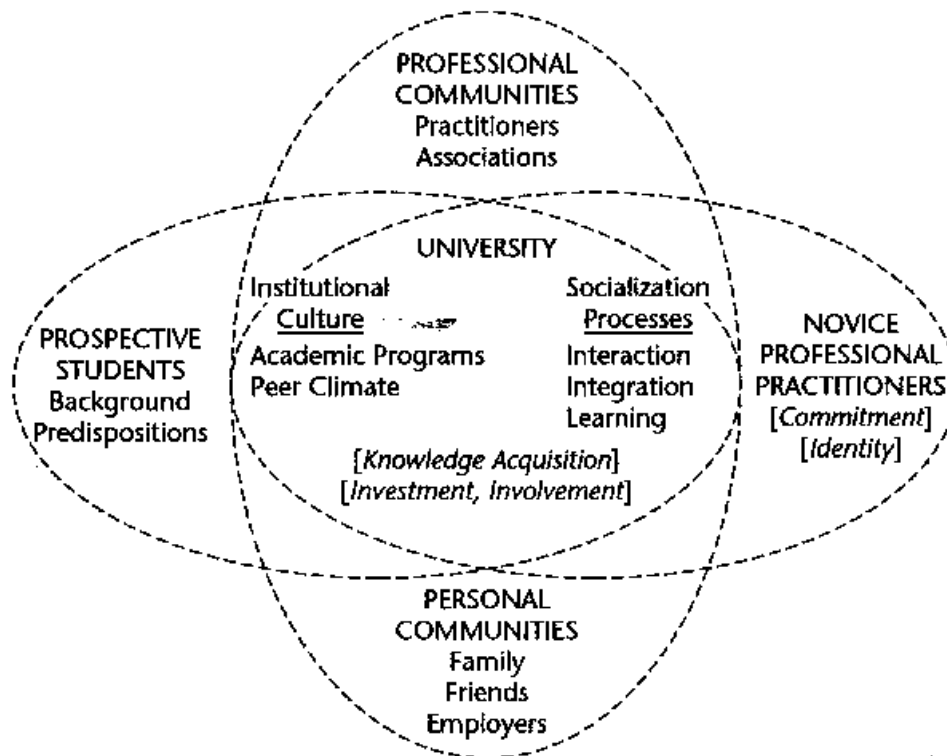Fig. 1 Conceptualizing graduate and professional student socialization

Figure 1 shows a framework for understanding the socialization of graduate and professional students. At the centre is the core socialization experience in the professional degree program consisting of the institutional culture of the university, the socialization processes and the core elements of socialization. This is the part of the socialization process that universities have key control over.

Surrounding the central portion of Fig. 1 are four other components of professional student socialization: prospective students (background, predisposition), professional communities (practitioners, associations), personal communities (family, friends, employers) and novice professional practitioners. These components are outside universities control, though prospective student's backgrounds may be taken into account in the selection process. If universities work cooperatively with the professional bodies they can also increase their potential effect on the socialization process. The ultimate outcome from this model is the professional who has been transformed with respect to self-image, attitudes and thinking processes.

This socialization model provides context for this paper and previous research undertaken by Page (2004, 2005 and 2007), which has focused on gaining an understanding of aspects and perspectives relating to universities, professional communities and novice professional practitioners.

Page (2004, 2005 and 2007) examined research on the study of professional socialization in fields such as nursing, health sciences, sport and medicine, as they apply to the tertiary education context and the beginning of a graduates' working career. The findings of this review suggested that study and consideration of professional socialization assists in improving tertiary education and graduates' preparedness for the real world pressures of professional working life. Critical elements include the themes of early provision of context, role models, placement, reflection, ceremonies,

curriculum and long term impacts that could be considered in the development of valuation and property programs.

Page (2005) reviewed the socialization requirements that professional bodies representing valuers expect of graduates before they could become full members. This research was undertaken through a desktop analysis, which was validated through interviewing graduates and examiners about the final examination process to become full members of the Australian Property Institute and of Royal Institute of Chartered Surveyors.

This current paper provides preliminary findings in regard to the following research questions, which are part of a Doctoral thesis:

1. What are universities doing to socialize valuation students?

2. When do graduates entering the valuation profession believe they become a valuer?

3. What do graduates believe the universities could have done differently to improve the socialization process?

Two surveys were designed to assist in answering the research questions: one for graduates and one for program directors. These surveys were used as basis for interviews and the guiding questions for these surveys are included in the appendices. Sections 2 & 3 of this paper describe the logic and purpose of the survey components and sections 4 & 5 overview preliminary results of both surveys. The survey design (questions, logic and purpose) were informed by the research, including extensive literature review, undertaken by Page (2004, 2005, 2007). The graduate survey was informed by a pilot survey of graduates in 2003, which reviewed the graduates' perspective of professional socialization (Page 2005).

2 Program director survey

The program directors survey questions were grouped into six categories. It would be expected the questions in each of these categories would elicit information on aspects that influence the socialization process. The categories are:

1)   Program history & market

2)   Program design

3)   Program management & control

4)   Program implementation

5)   Program success & challenges

6)   Program leader

The guiding questions for each category are provided in Appendix 1

All property program directors or program leader, as listed on university web sites for undergraduate property programs in the Australia and New Zealand, were invited to participate in the discussion. Eight people participated in interviews that took place in November –December 2006. The following sections describe the rationale for each category.

2.1 Program History and market

The program content is likely to be influenced by its 'location' within the university organizational structure and whether it emerged from a business finance background or from a construction background. Page (2005) reviewed the nature of programs and their location within the university structure, which showed that the age of the program is likely to affect current program structure as it

will have evolved from a period when certain trends in university education were in place. The recency of program review is significant in determining if a program had undergone change or whether it would have to change soon as a result of university or government directions. If the program was in a transition phase this would be a pertinent factor as it could influence the study findings.

This study is specifically about the socialization of valuers. Many university programs have shifted their orientation over the last 20 years from being valuation only to having a broader property context. For example, the University of South Australia had three specialist streams for a decade, in valuation, conveyancing and property management/agency. Students interested in marketing or finance were encouraged to undertake either a second major or a double degree. In many cases property programs in Australia have provided elective streams of courses which allow students to specialize in a number of property fields.

The program mode can also impact on how students will be socialized e.g. full time vs. part time mode will affect the opportunity for students to undertake work experience or gain employment. The option of external vs. internal could have an influence over how students interact and the influence of the staff over the students' socialization.

2.2 Program design

Questions in this category were aimed at identifying which key aspects of professional socialization were taken into consideration in developing the program design. The questions were also aimed at identifying constraints preventing the development of the 'ideal' property program and specifically what the difference would be if some of these constraints did not exist. The university influence on program design is also important at macro and micro level.

The influence of the professional bodies on program design is also of interest, as it would be expected that this would have a significant influence. I specifically wanted to know more on this influence by asking what would be different if the professional guidelines did not exist.

2.3 Program Management and control

The questions in this category aim to identify what quality controls existed both internally and externally over the programs. The questions were also targeted at identifying the proportion of the program that was taught by property staff and industry professionals relative to staff from a non property background. This is likely to affect the socialization process.

2.4 Program Implementation

Implementation questions were included to discover what aspects of socialization occurred at specific stages of the program. The questions were also aiming to identify whether students' socialization opportunities differed and if the different learning was used to aid other students' socialization. The questions also examined some elements of potential socialization that could occur with industry links, such as work experience and mentoring schemes.

I was aware that at least three programs in Australasia were longer than three years as they had specific industry placements within their programs and additional question were asked to discover more about the socializing influence of these placements.

2.5 Program success and challenges

This section was aimed at obtaining the program directors perspective on the strengths and weaknesses of their program. This aimed to generate information to assess the key socialization aspects such as knowledge, values and attitudes. There was also a question on when they believed their students 'became' valuers, which would allow triangulation with the graduate survey.

2.6 Program directors

The questions in this section were to identify the program directors/leaders property knowledge, experience and teaching experience relative to the program as the program director or leader would/could be perceived to have significant influence on students.

3 Graduate survey and sample

The graduate survey examines influences on the individuals' socialization to become a valuer. Graduates were asked about their background and disposition to choose property studies, and in particular valuation. Graduates were asked specifically about the values, skills and knowledge they believe are critical for valuers and how well their university studies prepared them with respect to these aspects of socialization. They were asked to quantify this preparation on a 1-5 scale, which was utilized to obtain greater detail from the graduates. In the 2003 surveys, no scaling was requested and this idea came from Maben (2003).

Graduates were asked about their professional development since graduation and the role of the employer/mentor on their development. This is important to identify the aspects that influence the socialization of the novice valuer. Interviewees were asked to identify the point that they felt they changed from being a novice to full professional.

Finally, graduates were asked to reflect on their experiences at university and as a novice professional and provide thoughts on improvements or changes that could be made by universities/professional bodies/employers to provide more effective socialization.

Graduates working in three states were interviewed. Each of these States has significant differences in requirements for an individual to be able to act as a valuer. In South Australia, a new graduate can operate as a valuer as the tertiary educational requirement is all that is required for an individual to start operating as a valuer. If an individual is a member of the professional body, then they need to have their valuations countersigned until they achieved Certified Practicing Valuer (CPV) status. In Victoria, there is no licensing of valuers. Valuation work for government or certain firms requires a director or the valuer to be a CPV recognized valuer with the professional body. In NSW, valuers are licensed. The licensing authority will provide restricted licenses and graduates can quickly get a license to value residential properties. It takes longer for an individual to obtain a full license.

The graduate sample was obtained by asking the local API staff in each of the States to ask for volunteers from those who had achieved CPV status in the preceding 12 months.

4. Preliminary results of program director surveys

The analysis of the results is only at a preliminary stage. The surveys have been transcribed and initial themes are being identified. The following are some of the initial findings.

4.1 Program history and market

The property programs are not designed to only train valuer. Different end points and classification systems are used with one program identifying 11 different markets for their graduates. Programs are mainly dominated by school leavers (approximately 80%) and generally have a balance of 60% male 40% female. Most program directors commented that the trend over the last decade was for more females to be undertaking property.

The majority of the programs are designed around full time internal mode, though some did have a small amount of web material available to support internal students. Two programs had an external option and a third program had its material delivered at more than one site. The organizational location of property programs varies across the universities represented in the interviews, but the majority of property programs are within a business faculty. Irrespective of this 'location', most students face a common first year.

The program length varies between three and four years with the programs in excess of three years having an industry placement component. The programs of three years duration generally had no formal industry placement component. In one case, industry experience could be recognized for one course if the appropriate diaries were kept. Another program is contemplating recognizing industry experience and the program structure allows for this credit to be given.

4.2 Program design

All program directors indicated that they complied with the professional body's education requirements and that these requirements did not have a significant influence on program design. Most program directors indicated they would keep their programs the same even if there were no educational requirements from professional bodies. There is a little bit of '*tweaking at the edges*' in regard to how items are presented for the benefit of the professional body and in some cases program directors emphasized the importance of using the right language to show that values or content was incorporated into courses in other ways e.g. materials. The current proposed change of the API's compulsory academic requirements may influence the amount of rural content presented in the future as it will no longer be compulsory.

Curriculum overload is a recognized issue. When program directors were provided with suggestions for extra content, then they indicated that this resulted in discussion over what would be dropped to enable new aspects to be added. There is also the issue of work load for property courses compared to other courses in the faculty. I was left with the impression that many property courses contained more assessment and expectations than other business courses and this was a concern.

The accreditation of business programs by other authorities also impacted on property programs. The need for business students to have capstone units, international perspectives or other graduate qualities in some cases reduced the amount of property content.

Many of the property programs have an advisory committee who meet at least once a year. This advisory committee provides feedback to program directors on proposed changes. The advisory committees had no formal functions and in some cases, they are there as a trade-off for money provided by industry or a conduit to industry to hopefully obtain resources or cooperation.

The program directors with short experience were most frustrated by university policy and procedures on program design. The longer term program directors just saw them as factors that had to be worked with. The new research framework is also perceived as a threat by a couple of program directors. They perceived that it would reduce staff student interaction, which they believe is important.

4.3 Program management and control

The property programs all have annual internal university reporting and annual reporting to the relevant accrediting professional bodies. The programs also have significant reviews every three to five years. These quality controls are not seen as a threat to the professional socialization of students. In several situations, the licensing board also participated in an annual review. The licensing authorities that participated probably had a higher influence than the professional bodies and this probably arises due to these authorities having full time staff.

The property courses are mainly taught by full time university staff and industry personnel are used as guest lecturers on specialized topics. Industry personnel are not used as tutors or as markers. It was commented that some industry individuals wanted to '*give back*' to the industry and they often offered to give some specialist lectures. . In one program fifty percent of the property courses are taught by industry practitioners with this program only having a few permanent university staff.

4.4 Program implementation

Most of the programs have a common first year, which means that property teaching is generally only minimal in the first year. In some cases, a property course or part of a property course is incorporated a core course. In one program, common first year courses were moved to second year to allow property courses to be included as part of first year studies. Most program directors accepted a common core was an economic reality. In most cases, there appeared to be no concern that a property course was not undertaken in the first year of study.

In most programs there is some interaction with the profession in the first year. This often involved a couple of presentations and drinks but only one program director emphasized these events as being important. In this situation, the students are exposed to recent graduates who discuss what their job entails. Many program directors comment 'fondly' on the drinks.

Program directors are keen, however, to provide student interaction with industry and professions later in the program in the second and third years. This is implemented through mentor schemes or specialist guest lectures. As part of one course, one of the institutions invited past graduates to discuss their work with students over a three to four week period. Two program directors commented that students are encouraged to participate in the young version of the Property Council of Australia Events.

4.5 Program success and challenges

Professional values

The students of most property programs are made aware of the relevant professional body guidelines. A small amount of program time was allocated to developing professional values. There was however some skepticism that the desired professional values could be taught and that students either came with them or did not. One program director indicated that the demonstration of professional values by staff and program directors was essential in developing student professional values and he also flagged the importance of not accepting unprofessional behavior, in particular cited plagiarism.

Professional practice

Program directors indicated that they make students aware of the professional practice guidelines and also expected students to undertake some valuations within the program. It is acknowledged that the programs only provide limited opportunities for students to undertake valuation, due to constraints on the volume of assessment. It is seen as industry responsibility to develop these skills after graduation.   In some programs a six month (minimum) industry practicum provides an

opportunity to gain further professional practice skills. An understanding of professional practice is also picked up by mentoring and buddy schemes, which involve students shadowing those in industry for a short period of time. This is done with the expectation that students will know more about work tasks and industry practice.

Professional knowledge

The professional knowledge to be a valuer is generally taught over several courses in the final two years of the program. Program leaders believe this is done well but there are issues about how much could be provided within the programs. There is clearly no difficulty in finding material.

Program challenges

Program leaders did not indicate any specific challenges that were common across all their programs, though there was some commonality in that the profession and industry had to be realistic in what could be achieved in a three year undergraduate degree .Their was also some lamentation of the amount of students' commitment to their studies with competing interests taking priority.

4.6 Program Leaders

The program leaders/directors interviewed were all experienced in their role. All but one had worked as a professional valuer.

5. Preliminary results of graduate survey

This section presents some preliminary findings from a small sample of the graduate interviews, as these interviews are still being transcribed.

The graduates interviewed were diverse in several respects. The sample included graduates of undergraduate programs in WA, SA, NSW and Victoria and postgraduate programs in Victoria and SA. The postgraduates were mature students undertaking a career change. The undergraduates included both school leavers and mature students undertaking career changes.

5.1 Graduates professional values

Graduates noted the professional values that were critical for valuers were:

1)   Confidentiality

2)   Resisting client pressure including pressure from a clients ex-spouse

3)   Duty of care

Pressure from clients was mentioned frequently but interviewees also said that valuations relating to property settlement were particularly difficult. The pressure was not necessarily from the client but rather the clients' partner who was occupying the house. This has changed a little with new family court procedures that require only one valuation. The valuer still felt under pressure to look at all aspects that the house occupier wanted to show them and listen to all the issues about the house. It was important so that the lawyers heard that they had undertaken a thorough job. The graduates believe it is a distraction process. The other aspect of this work is the honing of communication skills, as often the house occupier does not want the valuation to occur and is trying to delay the

process. Convincing the house occupier to allow the valuation to be undertaken often requires considerable negotiation, particularly to enable the valuation to occur in a reasonable timeframe.

The graduates believe the university made them aware of the professional values of confidentiality, resisting pressure and duty of care but that they were not sufficiently prepared for the pressures.

5.2 Graduates skills

Graduates identified five significant skills for valuers:

1) Communication both written and verbal including networking

2) Rational/logic/analytic skills

3) Research skills

4) Computer literacy

5) Spatial information and analysis skills

Networking is an essential skill for a valuer. Sharing of data and information on properties is important to be able to undertake the task. Attendance at professional development workshops is identified as important in meeting people that you may need to ring in the future for advice.

Graduates regarded written and verbal communication skills as being highly important. Though they had written reports at university, these *'took on another level'* when they had to be written for a client who did not know the property. The report had to describe the property and how the valuer determined its value. The graduate's report had to be internally consistent and the valuer also needed to be able to put their own opinion on paper in a precise and accurate way.

Analytic skills were regarded as critical in processing the available information in order to perform the valuation and research skills are required to track down relevant data.

Graduates who had undertaken municipal valuation work in Victoria were required to produce spatial valuation data. This was a skill they believed was not taught. Graduates from a surveying background indicated that not enough use was made of spatial information. They believed it can provide an important perspective, as patterns of values with respect to surrounding properties can be identified. This improves the valuation for the client, making the valuation result more equitable.

The graduates felt they were well prepared for analytical and research skills but they felt underdeveloped in the other skills areas especially communication.

5.3 I am a valuer

Graduates were asked when they believe they become a valuer. The point of acknowledging one self as being a valuer was generally not state licensing, graduation or achieving certified practicing valuer status with the Australian Property Institute. The general theme from the interviews was the point when:

- *"I have people (other professionals) ask for your views on the value of a property".*
- *"I started to rely on your own advice".*
- *"I started to feel that you were adding value".*

Three CPV's believed they were still not professional valuers as they believed they still did not have specialized knowledge in a field within valuation. They told people they had the valuation credentials but felt they had some *'time to go'* to really become a valuer. This has consistency with the program directors thoughts who gave a range of answers on the time it would take time to

become a valuer which was linked to property type i.e. for residential valuations, within a month and up to two years for the more complex commercial valuations.

5.4 Graduate valuer supervision and mentoring

In larger firms there is more of a process of corporate governance in which every valuation leaving the firm must be signed off by a director and directors also normally have their own work checked by others. The degree of review was generally dependent on the total value of the valuation and the degree of complexity. In small firms or single person firms this could not occur. As opposed to valuers within larger firms, who could readily call on the expertise of others within their organization to provide insights on methods to help with data or to have meaningful discussion about aspects of valuation.

Within larger firms there is also an opportunity to rotate work and obtain experience in different valuation fields. In small firms, diversity of work depended on the client base of the owner. This could be broad or it could be narrow. If the firm has a narrow valuation work base e.g. mortgage valuations, then it can be difficult for the graduate to obtain significant experience. This can be overcome by spending some time working for other firms. It can also be overcome to some extent through discussion groups, relevant professional development and one graduate commented on attending a Geelong discussion group.

However, some graduates are often keen to take up work with mortgage valuation firms as they generally earn high initial salaries. The valuation firms provide the greater breadth of experience but pay significantly lower salaries. This can provide significant dilemmas for graduates as they need to consider '*more money now or more money hopefully in the future*'.

The API has not necessarily ensured that graduates truly have the professional depth of experience though it has recognized the problem and has been piloting specific workshops to assist graduates obtain the range of experience required. This issue is discussed often by graduates. Some are very concerned that CPV is granted to all when it is obvious some do not have the breadth of experience.

6. Discussion

The first review of these results indicates that socialization of valuers is occurring well. If we consider the socialization literature then the main inconsistency with practice, I would suggest, is the provision of a clear end point in the early stages, as very little property is taught within the first year of programs. The linking with industry and profession in the first years appears to be about welcoming drinks rather than a serious effort to paint the big picture. This again raises questions about what endpoint to paint when program directors have identified up to eleven career end points with most programs clearly producing graduates for several property careers. Program directors talked enthusiastically about the professional socialization that occurred for students when they undertook work placements, part-time property work or formal practicums. Program directors did not, however, try to utilize or formalize in any way the sharing of students' experiences with students who had not participated or had participated in different experience.

I have found students at university extremely resistant to improving their communication skills. The graduates, however, noted this as one of the most important skills and also rated universities as performing poorly in development of these skills. I did not, however, interview any graduates from programs in which program directors indicated that spent considerable effort in developing report writing skills.

The main elements of valuation socialization provided through universities are the body of knowledge required and an introduction to valuation practice and values. All these elements are further developed in the workplace. It is clear that professional development is likely to be

undertaken well in larger firms where there is good corporate governance procedures, information exchange with other valuers and a range of valuation experiences. It is not necessarily so in the smaller firms and especially for novice valuers who only do mortgage valuations. The literature on socialization gives multiple examples of changes made to university programs that are intended to improve a profession for them to be subsequently sabotaged through the novice professional's first working experience. The graduates surveyed are clearly aware of this and are also concerned that some fellow graduates are able to become CPVs without the real breadth of valuation experience.

7. Conclusion

The socialization of valuers is dependent on many influences including the universities and the first employers. The universities are highly accountable to the profession in undertaking this role. Consideration needs to be taken in ensuring graduates who work for firms who do not take the same care can be appropriately socialized into the profession. Poor socialization will be long lasting and create difficulties for the profession.

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Appendix 1

Guiding questions for discussion with Program Director (course coordinator)

Professional socialization is the provision of knowledge, skills, values and attitudes to operate in a profession.

The questions cover six areas

1 program history & market

2) program design

3) program management & control

4) program implantation

5) program success & challengers

6) program director

Program history & market

Outline

1) name of the property program
2) how long has program run and when was program last reviewed
3) what are the target markets for the graduates & does this effect choice within the program
4) is the program the same for all modes of study, fulltime, part-time, external and online.
5) How many students are undertaking this program and what is there general profile with respect to age, experience, study mode and gender.

Program design

Outline

1) what are the guiding principles in deciding content of program
2) how is the professional values developed within the program
3) how is an industry orientation built into the program
4) how do you get your students to understand professional practice
5) what role does the API , RICS ,SISV, NZPI guidelines have in the design of your program
6) if the guidelines did not exist, would your program look differently and what would be different.
7) what parts of the program are designed specifically for those graduates going on to become valuers.
8) constraints on design of program through university policy
9) role of faculty/ division in design of program

Program Management and control

Outline

1) what % of program is taught by property staff
2) what % of program is taught by industry practitioners
3) what involvement do professional bodies play in checking quality of program on annual basis
4) what other checks do you have on quality control both annually and periodically

Program implementation

Outline

1) what do you do in the program/course in the first few months to orientate the students to the profession
2) what do you do in the subsequent periods.
   a. Year one
   b. Year 2
   c. Year 3

       d. Year 4
3) Do you vary this for students with different backgrounds in property
4) Do you do anything to share the property work experience of students with fellow students
5) Do you involve the industry in orientating students towards industry.
6) Do you encourage students to be involved in industry activities-if so how is this encouraged
7) If industry placement program-discuss its operation, success and challenges
8) What different, needs to be provided to valuers relative to other property graduates

Program success & challenges
Outline
1) the success of your program in preparing graduates for work in the property industry with respect to
   a) Knowledge (or content)
   b) Professional practice –would they be able to undertake work inline with professional requirements
   c) Professional values-would they act ethically and not be pressured /seduced to meet clients need
2) what are the weaknesses of your graduates
3) can you separate your answers for this for valuers vs other property professionals.
4) for the valuation graduates, at what point do you believe they become a valuer.

Program director
Outline
1) years teaching
2) yrs as program director
3) property education
4) Property experience

Appendix 2

Graduate survey

The discussion topics include:

- **Background** – statement of confidentiality, background characteristics, name, age, entry means into property degree, study mode, work experience,(prior during & post graduation)
- **Professional development,** participation in a professional body during and since graduation. Professional development plans .
- **Decision** – why did individuals become a valuer, understanding of property, was their decision influenced by anything?
- **Expectations** – did the individuals experience a difference in the property program undertaken and what they expected, is working as a valuer what they anticipated?
- **Career goals** – did the individual always want to be a valuer, what are their career goals?
- **Values/attitudes** – what are the social responsibilities of valuers, what pressures have will they/they come under? Were they prepared for these pressures? How would you rate your preparedness on scale 1-5 (where 5 is fully prepared and one not prepared) comment on why this score)
- **Skills** – what skills does the individual see as being essential for becoming a valuer? How would you rate your preparedness with respect to skills., again on 1 -5 scale. Comment on why this score
- **Professionalism** – what characteristics represent professional valuer, at what stage do the individual change from being a student to being a professional valuer?
- What was it that led the individual to decide they are a valuer? Was there a transition point?
- **Professional experience** prior to becoming a CPV (API) or APC (RICS) – assistance/ roles of tasks to become a valuer, role of mentor. What valuation type work have you undertaken and what other property experience.
- **Change** - what would the individual change (WRT to experience, content, format etc.) in the university or post-graduation experience if they were undertaking these phases again?