ESTATE AGENCY AFFAIRS BOARD
OF SOUTH AFRICA

THE INTERN ESTATE AGENT

MANDATORY WORKPLACE LEARNING PROGRAMME

LOGBOOK

AND

WORKPLACE PORTFOLIO OF EVIDENCE

ESTATE AGENCY AFFAIRS BOARD
OF SOUTH AFRICA

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An example of an internship agreement/contract is provided for possible use by the parties to the internship arrangement. The agreement/contract may either be used entirely in its current format or so amended as necessary to meet individual circumstances.

INTERNSHIP AGREEMENT

This Contract of Internship is made and entered into by and between _____, a full status principal estate agent holding a valid fidelity fund certificate issued by the Estate Agency Affairs Board (hereinafter referred to as "the Principal"), and _____, identity number _____ (hereinafter referred to as "the Intern"), pursuant to which:

1. The Intern binds him/herself and commits and undertakes –

1.1 to serve the Principal diligently, honestly, properly and confidentially in and about his/her profession as an estate agent for a continuous period of twelve months commencing as and from the date of the issue to the Intern of an intern's fidelity fund certificate by the Estate Agency Affairs Board;

1.2 to execute all lawful instructions that may be given to him/her by the principal, or by any other full status estate agent in the service of the Principal who has been delegated by the Principal to issue any lawful instructions to the Intern, in and about the course and scope of his/her service as an intern estate agent to the Principal;

1.3 not to absent him/herself from the service of the Principal without the Principal's consent to do so having first been sought and obtained;

1.4 to devote him/herself conscientiously to the business of the Principal and not to engage in any business whatsoever other than that of intern estate agent in the service of the Principal unless the written consent of the Principal to do so has been sought and obtained by the Intern.

2. The Principal commits and undertakes that –

2.1 he/she will use his/her best efforts and endeavours diligently to mentor, teach and instruct the Intern in the practice and profession of an estate agent; and

2.2 he/she will actively supervise and meticulously appraise the estate agency functions and activities of the Intern from time to time and will, furthermore, ensure that the Intern accurately maintains and keeps the mandatory workplace learning programme logbook and that he/she will duly sign-off such logbook prior to its submission to the Estate Agency Affairs Board on the termination of the internship period to enable the status of the Intern to be upgraded to that of full status non-principal estate agent.

3. The parties acknowledge that they are fully aware of the provisions of Regulations 2(4) and (5) of the Standard of Training of Estate Agents Regulations, 2008, in respect of the estate agency acts which the Intern may and may not perform, and hereby undertake to comply strictly therewith.

4. Should the Intern fail either:

4.1 to be duly certificated against the Further Education and Training Certificate: Real Estate, or an equivalent qualification, during the internship period referred to in paragraph 1.1 above; and/or

4.2 to pass the Professional Designation Examination for non-principal estate agents during that period;

it is agreed that the internship period shall be extended for a further period, not to exceed an additional period of twelve months, to enable the intern to be duly certificated against the Further Education and Training Certificate: Real Estate, or an equivalent qualification, and to pass the Professional Designation Examination for non-principal estate agents.

5. Should the Principal discontinue practicing as an estate agent or should the Intern wish to secure the services of an alternative principal estate agent during the duration of the internship period it is agreed by the parties that the Intern shall be entitled to cede this contract of internship to another Principal for the remainder of the internship period.

6. Should the Intern:

   6.1 fail to serve the required period of internship in accordance with this contract of internship; and/or

   6.2 commit a material breach of this contract of internship; and/or

   6.3 be found guilty by a court of law in respect of any offence involving an element of dishonesty; and/or

   6.3 be found guilty by a committee of inquiry of the Estate Agency Affairs Board of conduct deserving of sanction;

   the Principal shall be entitled forthwith to cancel this contract of internship and to dismiss the Intern from his/her service.

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Thus done and signed at _____ on this _____ day of _____, 20___, by the parties.

_____
Principal

_____
Intern

_____
Parent or guardian if the Intern is a minor

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Details of intern estate agent:

Name:		
Identity number:		
Contact details:	Telephone no: Cellular no:	
	E-mail address:	
Employer:		
Principal (name and surname):		
Details of mentor/coach/supervisor (if the mentor/coach/supervisor is not a principal of the firm):		
Starting date:		
Completion date:		

A copy of the intern estate agent's identity document must be attached to this page.

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Details of initial principal/mentor/coach/supervisor ("the principal")

Details of mentor/coach/supervisor (to be completed where the proposed mentor/coach/supervisor is not a principal of the firm):		**Details of principal:**	
Name:		Name	
Surname:		Surname	
ID Number:		ID Number	
Individual reference number:		Individual reference number:	
Name of firm:		Name of firm:	
Physical address of firm:		Physical address of firm:	
Contact details of firm:		Contact details of firm:	
Contact details of mentor/coach/supervisor:		Contact details of principal:	
E-mail address of mentor/coach/supervisor:		E-mail address of principal	

A blank letterhead reflecting full details of the principal's estate agency enterprise must be attached to this page.

Procedure to be followed on change of principal

Regulations 10 and 12 of the Regulations pertaining to the Issue of Fidelity Fund Certificates must be followed whenever an intern estate agent changes principals during the course of the internship period.

Such regulations provide as follows:

Regulation 10

"The holder of a fidelity fund certificate shall inform the Board within fourteen (14) days of any change in the information supplied to the Board at the time of applying for the issue to him/her of such certificate and, if the information appearing on the certificate is no longer applicable or has changed such certificate shall forthwith be forwarded to the Board for the appropriate amendment thereof or for the issue of a new certificate in substitution thereof."

Regulation 12(1)

"If a fidelity fund certificate was issued to an [intern estate agent] and such person ceases to be employed by or associated with the employer mentioned in such certificate, that employer shall, within fourteen (14) days of such person ceasing to be in his/her employ, or to be thus associated, return such certificate to the Board together with a notification informing the Board of such fact and, if such information is available, stating with whom that person is taking up employment or becoming associated."

Regulation 12(3)

"If the employer concerned is unable, for any reason, to return the certificate as required … the employer shall, within fourteen (14) days of the termination of employment or ceasing to be associated, inform the Board of that fact, stating the reasons why it is unable to return such certificate as well as furnishing all available information concerning the whereabouts of such employee or independent contractor."

- Should the intern estate agent, therefore, at any time and for whatever reason, decide to change firms and/or principals during the course of the internship period, it is required that both the previous principal and the intern estate agent inform the EAAB in writing of this fact within fourteen (14) days of such change.

- The previous principal must advise the EAAB of such change on a letterhead of the

firm which must, furthermore, clearly indicate the date when the intern estate agent ceased, or will be ceasing, service with the firm as well as with whom the intern estate agent intends entering service, if such information is available. The previous principal must also return the 'intern' fidelity fund certificate issued to the intern estate agent to the EAAB.

- If the previous principal is unable, for any reason, to return the 'intern' fidelity fund certificate to the EAAB, the letter must state the reasons why he/she is unable to do so and also provide all available information concerning the whereabouts of the intern estate agent.

- Immediately the intern estate agent, in any event, commences service with a new principal that new principal is required forthwith to advise the EAAB accordingly on a letterhead of the firm which must, in addition, clearly indicate the date when the intern estate agent commenced service with that firm.

- Once the EAAB has been duly advised accordingly by the new principal it will be in a position suitably to amend the returned 'intern' fidelity fund certificate to correctly reflect the details of the new estate agency firm in whose service the intern will henceforth be.

A copy of all such letters must be inserted by the intern estate agent into both this logbook as well as into his/her portfolio of evidence.

It will also be necessary for the new principal suitably to amend this logbook by providing the full details required of a principal.

Details of <u>new</u> principal/mentor/coach/supervisor ("the principal") [<u>Only to be completed after a change of principal has been made</u>]

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Details of mentor/coach/supervisor (to be completed where the proposed mentor/coach/supervisor is not a principal of the firm):		**Details of principal:**	
Name:		Name	
Surname:		Surname	
ID Number:		ID Number	
Individual reference number:		Individual reference number:	
Name of firm:		Name of firm:	
Physical address of firm:		Physical address of firm:	
Contact details of firm:		Contact details of firm:	
Contact details of mentor/coach/supervisor:		Contact details of principal:	
E-mail address of mentor/coach/supervisor:		E-mail address of principal	

A blank letterhead reflecting full details of the new principal's estate agency enterprise must be attached to this page.

Details of new principal/mentor/coach/supervisor ("the principal") [Only to be completed after a change of principal has been made]

Details of mentor/coach/supervisor (to be completed where the proposed	**Details of principal:**

mentor/coach/supervisor is not a principal of the firm):			
Name:		Name	
Surname:		Surname	
ID Number:		ID Number	
Individual reference number:		Individual reference number:	
Name of firm:		Name of firm:	
Physical address of firm:		Physical address of firm:	
Contact details of firm:		Contact details of firm:	
Contact details of mentor/coach/supervisor:		Contact details of principal:	
E-mail address of mentor/coach/supervisor:		E-mail address of principal	

A blank letterhead reflecting full details of the new principal's estate agency enterprise must be attached to this page.

Hints on maintaining the logbook

For the training intervention to be successful it is essential that the intern logbook, which accounts for the completion of specific activities or sets of activities, be conscientiously

maintained by the intern estate agent and, also, be presented, for perusal and sign-off, to the principal/mentor on a monthly basis.

As the primary function of the logbook is both to record and keep track of the practical estate agency knowledge that has been acquired by the intern estate agent over the course of the internship period, the first step in simplifying what could otherwise become a rather complex process is, of course, for both of the affected parties carefully to read, assimilate and understand the contents of the entire logbook and, thereafter, to agree on a mutually acceptable plan of action for its effective implementation.

Once it has been accepted by the parties that the logbook represents a realistic and achievable training blueprint, to be implemented over the full twelve month internship period, reasonable time lines for completion of the various required activities should then be discussed, agreed upon and established. The parties may even agree, having regard to the specific nature of, and the precise estate agency activities undertaken by, the individual estate agency enterprise, either to dispense with certain of the prescribed activities or to add new activities. In such a case the full reasoning for the omission or addition of the activities in question should be provided. This would be particularly relevant to intern estate agents functioning in, for instance, the agricultural property, auctioneering, time-share or business broking environments.

An easy and convenient way to ensure that the logbook is always current is for the intern to keep the logbook close at hand and to make it a habit immediately to update the logbook as and when this is required. Updating the logbook by the intern estate agent, and the appraisal of the intern estate agent by the principal/mentor, should, in fact, become part-and-parcel of the administrative routine and training environment of the estate agency enterprise. Doing so will significantly minimise the effort that would otherwise be required and ensure that the importance of the logbook is not overlooked.
It is, moreover, essential that each relevant training intervention, no matter that it might seem to be small or insignificant, be accurately recorded in the logbook, particularly if the intern estate agent is learning something new or undertaking some function, duty or activity for the very first time. The logbook, essentially, represents a valuable document and record of learning and achievement, for both the intern estate agent and the principal or mentor, and should be treated accordingly.

Introduction to the practice of estate agency

The primary functions of an estate agent

The term ‘estate agent’ is generally used when describing a person, or an organisation, whose primary function includes:

- the marketing of real estate or any business undertaking for sale or for rental on behalf of a client or clients; and/or
- the management of immovable property on behalf of a client or clients; and/or
- the obtaining or the marketing of financing for, or in connection with, the management, sale and purchase of immovable property; and/or
- the provision of services, whether as an intermediary or facilitator, with a view to effecting the conclusion of an agreement to sell and purchase, let or hire, immovable property;

against the payment of a fee, usually in the form of a commission calculated as an agreed percentage of the value of the property sold or managed or the value of the lease concluded. An estate agent, therefore, typically functions as the intermediary between sellers and buyers, lessors and lessees, of immovable property and facilitates the marketing of property by sellers and lessors through the selling or renting out of that property at the best possible price and on the best possible terms as well as the management of properties on behalf of the client.

Estate agency services

Estate agency services, thus, will generally include:

- marketing immovable property or business undertakings to prospective buyers and/or tenants;
- managing immovable property for clients;
- facilitating a purchase/lease by guiding prospective buyers/tenants through the process;
- facilitating a sale by guiding sellers through the selling process;
- preparing estate agency related contracts and documentation.

The relationship of trust between an estate agent and clients

The estate agency relationship existing between an estate agent and clients is established with particular reference to the common law of agency. The estate agent, therefore, has a fiduciary relationship, or a relationship of trust, with clients meaning that

the estate agent must exercise the highest possible standards of care and of fair and honest dealing. An estate agent may not, for instance, place own personal interests before the fiduciary duty owed to the principal and may also not profit from the fiduciary position that is occupied without having first obtained the consent of the principal. The fiduciary duty, furthermore, includes the duty to exercise maximum care, maintain strict confidentiality, ensure loyalty, be obedient to the instructions of the client, account to the client and maintain full transparency which includes the making of full and open disclosure to the client.

Mandatory registration of estate agents with the Estate Agency Affairs Board and the issue of fidelity fund certificates

Estate agents, if they are to practice legally, must be registered by the Estate Agency Affairs Board, the statutory regulatory of the estate agency profession. Such estate agents will then be issued with a valid fidelity fund certificate (or licence to operate) in accordance with the provisions and requirements of the Estate Agency Affairs Act, 112 of 1976. Unlicenced persons purporting to perform the functions and activities of an estate agent are acting illegally. They will be liable to criminal, civil and disciplinary sanctions for doing so.

The Further Education and Training Certificate: Real Estate required for non-principal estate agents

All non-principal estate agents, including intern estate agents, must complete the Further Education and Training Certificate: Real Estate (NQF Level 4). This qualification enhances the provision of entry level service within the property and real estate professions and provides the broad knowledge, skills and values needed in the property and real estate environment. The intern estate agent may be certificated against the qualification after undergoing training through an accredited education provider or by way of a Recognition of Prior Learning assessment (where appropriate).

The National Certificate: Real Estate required for principal estate agents

Persons wishing to act as principal estate agents and run their own estate agency enterprises must be certificated against the National Certificate: Real Estate (NQF Level 5) before a principal's fidelity fund certificate can be issued to them. This qualification not only adds value to the understanding of the property and real estate sector by principal

estate agency practitioners but also enhances their appreciation of the practical functionalities that occur within the workplace. As the qualification builds on the skills that have already been acquired in the Level 4 qualification, an estate agent must first have been certificated against the NQF Level 4 qualification before that person can proceed to the NQF Level 5 qualification. The National Certificate: Real Estate consolidates the broad knowledge, skills and values that are required to achieve success, both financially and reputationally, in the property and estate agency professions.

Undertaking the Professional Designation Examination for principal and non-principal estate agents

The satisfactory completion by estate agents of either the Further Education and Training Certificate: Real Estate or of the National Certificate: Real Estate, as the case may be, constitutes the prerequisite for admission to the Professional Designation Examination ("PDE") - a practical and integrated test of knowledge for estate agents conducted by the Estate Agency Affairs Board. The PDE represents the final test of an estate agent's ability practically to implement and apply the learning that has been achieved in both the classroom and at the workplace.

Relevant educational requirements for persons wishing to practice as principal estate agents

Persons wishing to become principal estate agents are, therefore, required to complete the following educational requirements, namely:

- the Further Education and Training Certificate: Real Estate (NQF Level 4);
- the Professional Designation Examination for non-principal estate agents (PDE 4); and
- the National Certificate: Real Estate (NQF Level 5);

before a principals' fidelity fund certificate can be issued by the EAAB.

Such persons are granted a period of two years from the date upon which they were certificated against the National Certificate: Real Estate within which to pass the Professional Designation Examination for principal estate agents (PDE 5).

The award of professional designations after passing the Professional Designation Examination

Persons who pass the PDE are accorded recognition as professional estate agents by the Estate Agency Affairs Board. Non-principal estate agents may, therefore, use the designation Professional Practitioner in Real Estate ("PPRE") for so long as they hold a valid fidelity fund certificate issued by the Estate Agency Affairs Board while principal

estate agents are entitled to the designation of Master Practitioner in Real Estate ("MPRE"), also for so long as they hold a valid fidelity fund certificate issued by the Estate Agency Affairs Board.

Continuing Professional Development requirements

A continuing professional development ("CPD") requirement for estate agents was implemented from 1 August 2012. This requirement conforms to current best practice requirements to be found in most world-wide real estate regulatory jurisdictions. Members of the estate agency profession must maintain their professional standing and status through undergoing the mandatory continuing professional education and development programme. CPD enables estate agents to keep abreast of relevant sector and property trends and changes since these can, cumulatively and sequentially, have significant consequences on both the internal and external environments within which estate agents must operate.

Globalisation, for instance, is one of the more easily identifiable factors that continues to exert a significant and immediate impact on real estate markets which, as a result, have been successfully transformed into an international working environment. The advent and exponential growth of the internet and other electronic modes of communication has, furthermore, rendered hitherto existing borders and boundaries obsolete and has made the national property markets of most countries accessible to millions of new consumers, who do not necessarily reside in those countries. While it is self-evident that globalisation and/or the internet can create significant new revenue streams and potentially lucrative business opportunities for estate agents, it is equally apparent that the acquisition of specialised skills, competencies, training and knowledge is necessary if this impact is to be maximised. This can be achieved through CPD.

In terms of the Estate Agency Affairs Board's CPD policy all registered estate agents are required to earn 60 CPD points over a three year rolling cycle.

Intern estate agents - background and overview

In terms of the Standard of Training of Estate Agents Regulations, 2008 ("the Education Regulations"), all persons seeking to enter the estate agency profession are required, as from 15 July 2008, first to serve as intern estate agents, acting under the supervision of a principal estate agent, for a continuous period of twelve months calculated from the date of the first issue to those new entrants of intern fidelity fund certificates by the Estate Agency Affairs Board ("EAAB"). This requirement applies to all new entrants, or

intern estate agents, regardless of any academic, professional or other qualifications which they may hold.

Restrictions attaching to the activities of intern estate agents

An intern estate agent may not perform any acts as an estate agent unless:

- the intern estate agent has duly disclosed in all printing material relating to the intern estate agent's activities as an estate agent, excluding authorised advertisements in the press, that the intern estate agent concerned is an intern estate agent; and
- the intern estate agent acts under the active supervision and control of a principal estate agent or of an estate agent who has continuously held a valid fidelity fund certificate issued by the EAAB for a period of not less than three years.

In addition, an intern estate agent may not:

- in any way, directly or indirectly, hold himself/herself out as someone who, or advertises that he/she, has complied with the educational requirements in terms of the Education Regulations;
- in any manner act or hold himself/herself out as being a full-status estate agent; or
- in his/her capacity as an intern estate agent, complete or draft any documentation relating to any transaction negotiated by him/her in his/her capacity as an intern estate agent, otherwise than in the presence of a principal estate agent or a full status estate agent having at least three years' experience, and who certifies on the documentation in question that the said documentation has been completed in his/her presence.

The mandatory one-year programme for intern estate agents

To accommodate the peremptory internship requirements of the Education Regulations the EAAB has introduced a mandatory one-year programme for intern estate agents. This programme is specifically designed to facilitate and monitor the induction of intern estate agents into the estate agency profession and is applicable to all new entrants, or intern estate agents, **regardless of the future status to which such persons aspire and/or of their current academic, professional or other qualifications**. The programme is, moreover, designed to ensure that intern estate agents not only acquire meaningful practical estate agency experience during the twelve month internship period but that they will also be exposed to an applied and relevant practical learning experience that will enhance, and add understanding, to their theoretical estate agency studies. The underlying objective of the programme is to ensure that intern estate agents are provided with the required structured learning environment that will assist them in acquiring the necessary practical workplace experience that they need if they are competently to perform the functions of a professional estate agents and that, just as

importantly, they are not, during the course of the internship period, relegated to the peripheries of estate agency practice.

A number of practical projects, applicable to the workplace, are incorporated into the programme. These projects should, insofar as possible, be completed by both the intern estate agent and the mentor during the course of the twelve month internship period. The intern estate agent will also be required to gather all relevant naturally occurring evidence to serve as proof that he/she has gained the requisite practical experience justifying an upgrade to full status as an estate agent after the expiry of the internship period.

Maintaining the logbook

The intern estate agent is expected, during the course of the twelve month internship period, to complete and maintain a logbook in which accomplished activities are not only fully recorded but, also, signed-off by the principal/mentor/coach/supervisor ("the principal") assigned to assist and provide the intern estate agent with logistical support during the internship period. It is anticipated that this requirement will ensure that the intern estate agent is provided with a personal record of all practical tasks completed and experience gained at the workplace.

A further advantage of the implementation of the programme is that, should the intern estate agent at any time wish to be assessed towards the acquisition of any real estate vocational qualification(s) and desire to use some, or all, of the evidence generated and recorded in the logbook for this purpose, that intern estate agent will be able to duplicate the logbook for submission to any assessor undertaking an assessment against the relevant qualification.

The logbook, in addition, serves as an important educational tracking device. As the intern estate agent completes the required workplace experience this achievement should be signed off in the logbook by both the intern estate agent as well as the principal.

Completing the Portfolio of Evidence ("PoE")

The portfolio of evidence will generally be a separate file (or files) carefully created and maintained by the intern estate agent, which should, ideally, align with the prescribed logbook activities. All naturally occurring workplace evidence generated over the twelve month internship period, and reflecting the workplace learning experience of the intern estate agent, should be inserted into the PoE. At the conclusion of the internship period the completed PoE must be submitted, together with the logbook, by the intern estate

agent to the EAAB. The PoE, and duly completed logbook, will jointly constitute acceptable evidence that the relevant workplace learning phase has been successfully completed by the intern estate agent. Only once the PoE and logbook have been considered and accepted by the EAAB can a status upgrade to full status estate agent be authorised.

The necessary implication for intern estate agents, of course, is that, immediately after any occupational activity has been satisfactorily completed, a follow-up meeting must be scheduled with the principal to discuss that activity, obtain approval and have the logbook signed off. The evidence for the activity should, simultaneously, be filed in the PoE. The PoE, thus, provides the required evidence of performance against the outcomes of the learning process as well as for later use, in the discretion of the intern estate agent, against the acquisition of any of the real estate vocational qualifications.

The duties and responsibilities of an intern estate agent

An intern estate agent is required diligently to:

- complete all information required in the prescribed logbook;
- complete necessary projects during the course of the twelve month internship period and also file applicable evidence of having done so in the PoE;
- complete workplace task forms and also file any applicable evidence in connection with the tasks in the PoE;
- regularly meet with the principal to plan the practical workplace experience programme and, at least monthly, to obtain an appraisal report on progress being made; and
- ensure that principal timeously signs off the logbook as certification that the intern estate agent has been exposed to the required workplace experience.

The duties and responsibilities of the principal/mentor/coach/supervisor ("the principal")

The principal is required to:

- familiarise himself/herself with all logbook requirements;
- regularly meet with the intern estate agent to plan workplace activities;
- ensure that the intern estate agent is provided with the opportunity to be exposed to each new learning situation;
- sign off, in the intern estate agent's logbook, all activities that have been completed by the intern estate agent; and
- complete at least a monthly appraisal report on the progress made by the intern estate agent and ensure that the appraisal report is inserted into the intern estate agent's logbook.

The mentoring process

Mentorship refers to the formal and informal developmental relationship where an experienced and knowledgeable principal, or full status, estate agent undertakes to advise and assist a newcomer to the estate agency profession, the intern estate agent, to develop the necessary skills, capabilities and capacities required for both personal and professional career development by that intern.

The functions of the mentor

The principal will, therefore, usually be required to:

- explore the needs, motivations, competencies and skills of the intern estate agent to ensure an ongoing commitment to the estate agency profession;
- use questioning techniques to encourage the intern estate agent to identify workable solutions and actions to workplace encounters and problems;
- support the intern estate agent in establishing appropriate work-related goals and methods of assessing progress in relation to those goals;
- observe, listen to and ask questions of the intern estate agent;
- where appropriate creatively apply one-on-one training for the intern estate agent;
- counsel and advise the intern estate agent; and
- consistently evaluate the outcomes of the mentoring process, using objective measures, to ensure the relationship with the intern estate agent is a successful one.

Ensuring successful mentoring

To be successful, the mentoring process must be:

- carefully planned, organised and implemented over the entire twelve month internship period; and
- constantly monitored, assessed and evaluated by the principal.

Training the intern estate agent

The principal and the intern estate agent should meet as frequently as necessary but at least once a week. It is desirable that the intern estate agent be given sufficient time between formal meetings to internalise and digest the issues that were discussed. It is also important that the participants ensure that they are suitably prepared for the meeting to avoid unnecessary time wastage and to derive the maximum benefit from the

meeting. Follow-up should be conducted after every meeting and, if required, appropriate amendments and changes made to the internship programme to ensure its continuing effectiveness. A well implemented follow-up procedure will generally expedite the required reporting and evaluation processes and also ensure that they are more reliable.

Overcoming possible obstacles to the success of the mentoring programme

- It is important that expectations flowing from the internship and mentoring process are realistic since, if expectations are unrealistically high, the reaction of the intern estate agent is likely to be one of extreme disappointment and unhappiness.
- Working principles and goals must be clearly stated at the outset and repeated when necessary.
- The parties must agree to commit sufficient time, resources and dedication to the internship process to ensure its success.
- Valid criticisms emanating from either the principal or the intern estate agent should be openly discussed and resolved between the parties.

Key factors contributing to a successful internship programme

An internship programme is likely to be more successful where:

- both the principal and the intern estate agent are properly committed and motivated to secure a positive outcome;
- the principal is both willing and able freely to contribute his/her knowledge, expertise, skills and experience to the intern estate agent;
- there is good structure to the execution of the internship project; and
- use is readily made of relevant documentation, appropriate presentations and real time on-the-job education and training to enhance the experiential quality of the programme.

The functions and duties of EAAB verifiers/inspectors

EAAB verifiers/inspectors will be required to:

- routinely visit the intern estate and the principal at the workplace to review, and provide guidance on, both the logbook and PoE maintained by the intern estate agent;
- identify and endeavour amicably to resolve any work related issues and/or problems and/or disputes that may have arisen between the principal and the intern estate agent in the interests of both parties;

- ensure that the interests of both the principal and the intern estate agent are advanced and, in addition, that the intern estate agent is provided with the necessary experiential workplace skills and competencies;
- review the principal's appraisal of the intern estate agent and discuss and implement such corrective action(s) as may be required in the circumstances; and
- report to the Education and Training Committee of the EAAB on the implementation of the internship programme.

Practical projects to be completed by the intern estate agent

The scope of the practical projects

While the various projects suggested in this log book were specifically designed to accommodate the core roles and responsibilities of the professional non-principal estate agent, it is believed that they might also be found to be of significant value to principal estate agents as well.

There is, of course, nothing that prevents the principal, from time to time or as and when necessary, from adding to, adapting, substituting or increasing the different recommended projects to enhance their experiential and learning value to the intern estate agent. This will, ultimately, depend on the perceived relevance of those projects to the actual workplace situation in which the intern estate agent is operating.

The intern estate agent should remember always to insert the naturally occurring evidence obtained when completing the projects into both this logbook as well as the relevant section of the intern's PoE.

Workplace experience

The scope of workplace experience

The objective of specifically focussing on workplace experience is to provide the intern estate agent with the opportunity for further development, and of becoming an integral part of the practical estate agency work environment, in as many of the different fields and/or departments related to this function as possible. It is essential that the intern estate agent be exposed to as many different fields and/or differentiated areas of estate agency as is feasible during the course of the internship period. All evidence generated during this experience should be placed in the PoE by the intern estate agent.

1. Induction

It is suggested that all intern estate agents be required to undergo an **induction** period of, at least, one week at the commencement of the internship programme. The underlying objective of this induction period is to ensure that the intern estate agent is given the opportunity to familiarise himself/herself with the policies, procedures, operations and culture of the estate agency firm and, similarly, for the estate agency firm to assess the qualities and strengths of that intern estate agent.

Other work-related aspects that might be emphasised during the initial induction phase of the training of the intern estate agent could include:

- the statutory elements in the structuring of the firm;
- an organogram reflecting the structured positions and reporting lines of the firm;
- the management functions of the firm, including lines of functional responsibility;
- the interaction and interdependence of the different functional departments making up the firm;
- the support structures available within the firm;
- an overview of the job descriptions and key performance indicators of managers, employees and non-principal estate agents in the service of the firm;
- the specific job description of the intern estate agent together with an analysis of key performance indicators; and
- the performance appraisal process that will be followed by the firm in respect of the functions and activities of the intern estate agent.

During the initial induction period the intern estate agent should be provided with a copy of all relevant documentation pertaining to his/her service as an intern estate agent at the firm, as more fully referred to above. It is essential, however, that the intern estate agent receive a copy of both the **Estate Agency Affairs Act, 112 of 1976**, and the

Code of Conduct for Estate Agents. [These documents must be included in the intern estate agent's PoE.]

It is likely that the induction programme will, in addition, concentrate on the following fundamental aspects of the particular estate agency firm in whose service the intern estate agent will henceforth be, namely:

- its core business activities;
- the internal ethical code of the firm;
- in-service policies and procedures including the firm's disciplinary policy;
- the values and ethics applicable to the estate agency sector in general and the firm in particular.

Core ethical values of the firm

The core ethical values of the firm, of course, represent those ethical values which the firm regards as being non-negotiable and which establish the foundation for the set of corporate ethical standards and commitments that encompass the organisation's approach to corporate responsibility.

In practice it will frequently be found that such core ethical values will generally include, amongst others, such identified values as:

- accountability;
- integrity;
- honesty;
- respect;
- trust;
- openness;
- stewardship;
- competence;
- justice;
- fairness;
- responsibility; and
- transparency.

It is important, in addition, that the intern estate agent be informed that such codes of ethics are usually designed to:

- identify the firm's ethical expectations of its employees; and
- offer advice and guidance in handling some of the more common ethical problems that are bound to arise during the course of the internship period, as well as thereafter.

It may also be useful for the firm to ensure that the intern estate agent is given the opportunity to attend relevant courses, seminars or workshops, whether internal or external, on business/professional conduct.

Such interventions may, in the discretion of the principal, include:

- discussions regarding the firm's policies and procedures;
- an analysis of specific ethics case studies; and
- the consideration of legal compliance requirements for estate agents.

It is generally advisable, and indeed recommended, that the intern estate agent be required to sign an acknowledgement or undertaking in which he/she commits always to abide by the provisions of the Code of Conduct for Estate Agents as well as the firm's own code of ethics, if applicable. [Any such signed undertaking should be included by the intern estate agent in the PoE.]

2. **The Estate Agency Affairs Act and the Code of Conduct for Estate Agents**

All intern estate agents should, during the induction period, receive a comprehensive overview and explanation of the various provisions of the Estate Agency Affairs Act and the Code of Conduct for Estate Agents - with special emphasis on how this legislation impacts on the estate agency environment in general and on the professionalism of estate agents in particular.

Note to the principal on appraising the intern estate agent

Principals are expected to undertake an objective appraisal of the progress of intern estate agents on, at least, a monthly basis and to insert such monthly appraisal report into the intern estate agent's logbook.

This appraisal should include an evaluation of the intern estate agent's willingness and ability:

- to establish and maintain constructive working relationships and to work effectively in a team;
- accurately and conscientiously to follow instructions;
- to plan and organise his/her own work functions by, inter alia, prioritising functions and tasks;
- to implement time-efficient work schedules and plans;
- to apply problem solving skills when handling potential ethical dilemmas; and
- to know, understand and conduct himself/herself according to the ethical requirements of the Code of Conduct for Estate Agents.

3. **Estate agency product/service training for the intern estate agent**

   It is essential that, in addition to generic estate agency instruction, the intern estate agent should undergo specific product/service training during the course of the internship period.

   This focussed training will generally emphasise the following aspects, among the many other possible aspects that are likely to be identified by the principal, namely:

   - the features, advantages and benefits of the range of estate agency products and/or services that are offered by the firm;
   - the firm's product mix;
   - the target market(s) that have been identified by the firm;
   - the firm's communication process(es) with specific reference to how the estate agency products and/or services are presented to clients and to potential clients;
   - legislation affecting the different estate agency products and/or services offered by the firm;
   - the sole and open mandate contracts used by the firm;
   - other contracts used by the firm, where applicable, in respect of:

     - sectional title sales and leases and management contracts;
     - commercial and/or industrial property sales and leases and management contracts;

  - property management;
  - community housing schemes sales and leases;
  - freehold housing sales and leases;
  - fractional ownership;
  - share block schemes; and
  - housing retirement schemes; and
- the after-sales service(s) provided by the firm.

[A copy of all these, and any other, documents should be placed by the intern estate agent in the PoE.]

4. **The legal environment of the estate agency sector**

It is essential that the intern estate agent should become fully acquainted with the general legal environment within which estate agency enterprises must operate. There are, furthermore, many different statutes that directly or indirectly affect the real estate function and which, as such, the intern estate agent should at least be aware of.

These statutes include, amongst the many others that the intern estate agent will be required to study during the course of the academic segment of the real estate qualification:

- the Constitution of the Republic of South Africa, 108 of 1996;
- the Estate Agency Affairs Act, 112 of 1976;
- the Alienation of Land Act, 68 of 1981;
- the Sectional Titles Act, 95 of 1986;
- the Share Block Control Act, 59 of 1980;
- the Housing Development Schemes for Retired Persons Act, 65 of 1988;
- the Rental Housing Act, 50 of 1999;
- the National Credit Act, 34 of 2005; and
- the Consumer Protection Act, 68 of 2008.

It is particularly important that the intern estate agent also become acquainted with the various legislative enactments which, read together, comprise the South African anti-money laundering legislation, including:

- the Prevention of Organised Crime Act, 121 of 1998 (“POCA”);
- the Financial Intelligence Centre Act, 38 of 2001 (“the FIC Act” or “FICA”);
- the Protection of Constitutional Democracy Against Terrorist and Related Activities Act, 2004
  (“POCDATARA”); and

- the Money Laundering and Terrorist Financing Control Regulations.

The principal must, generally, ensure that the intern estate agent is made aware of the various legislative measures, some of which have already been referred to above, that impact on the estate agency environment and on the functions and activities of estate agents. The principal should, if possible, furnish a copy of all such relevant legislation to the intern estate agent to be consulted when necessary and included in the intern estate agent's PoE.

5. **Knowing and understanding the general legal environment**

Insofar as the general legal environment is concerned the principal should take the necessary steps to ensure that the intern estate agent is directly exposed to as many of the following practical estate agency experiences as is feasible and possible within the constraints of the relevant estate agency undertaking, namely:

5.1. Knowing, understanding and applying **the basic principles of the law of contract** to the following estate agency documents, namely:
- ✓ sole mandate agreements;
- ✓ agreements of sale in respect of immovable property;
- ✓ agreements of sale in respect of sectional title units;
- ✓ agreements of lease in respect of immovable property;
- ✓ management contracts.

5.2. Knowing, understanding and applying legislative provisions that affect rights in immovable property, such as, for example, the correct procedure to be followed if:
- ✓ the person purporting to give a sales or letting mandate is not, in fact, the registered owner of the property concerned; or
- ✓ a usufruct (a real right) is registered in the title deed over the property in favour of a third party; or
- ✓ a servitude is registered over the property in favour of a third party which might negatively affect both the market value and saleability of the property.

5.3. Concluding contracts between minors, married persons and insolvents as well as the procedures that need to be followed to establish the legal capacity of private individuals, thereby ensuring the validity of such contracts.

5.4. Applying legislation provisions to contracts concluded with companies and close corporations including the procedures to be followed to establish that legal capacity of the person(s) signing the contract.

5.5. Understanding the provisions of the Estate Agency Affairs Act and knowing how the legislation impacts upon the principals of the relevant estate agency undertaking as well as the non-principal and intern estate agents in the service of that undertaking. This implies knowledge of the relevant procedures to be followed when applying to the EAAB for the issue of fidelity fund certificates as well as on advising the EAAB when estate agents either change estate agency firms or cease to practice as such.

5.6. Knowing, understanding and properly implementing the requirements of the Estate Agency Affairs Act where the receipt, and payment, of trust moneys is concerned.

5.7. Being aware of the importance of such matters as town planning schemes, the sub-division of immovable property and the zoning, and re-zoning, of immovable property by referring to relevant town planning schemes and following the zoning regulations in respect of immovable property within the area

5.8. Having a basic understanding of the conveyancing process for the transfer of property sold into the name of the purchaser including conveyancing requirements and the various documents required by conveyancers when undertaking the transfer process.

6. Financial processes and systems in the estate agency enterprise

Intern estate agents should, insofar as this is possible, be fully exposed to both the financial processes and systems of the estate agency enterprise during the course of the internship period.

Intern estate agent should be encouraged by the principal to acquire the necessary knowledge and practical experience in:

6.1. Advising purchasers on the various available options for the financing of property transactions including:

6.1.1 assessing the financial positions of both sellers and the proposed purchasers of immovable property;

6.1.2 researching the various financing options that are provided by different financial institutions;

6.1.3 understanding the concept of a mortgage bond;

6.1.4 being able to explain the qualifying criteria for the obtaining of home loans in terms of the National Credit Act;

6.1.5 calculating bond repayments over different time periods and at different interest rates;

6.1.6 explaining the conveyancing and bond registration processes to third parties;

6.1.7 accurately calculating the transfer costs that will have to be borne by the purchaser;

6.1.8 accurately advising sellers of the proceeds that will accrue to them from the sale of immovable property;

6.1.9 understanding, and being able to explain to third parties, the costs that will be incurred flowing from the ownership of immovable property including, for instance, fixed costs such as bond repayments, municipal rates and taxes and sectional tile levies and variable costs for maintenance and services.

6.2 The Financial Intelligence Centre Act ("the FIC Act")

As the Financial Intelligence Centre Act forms an integral component of the present estate agency operational environment it is essential that the intern estate agent, under the mentorship and guidance of the principal, be exposed to, at least, the following practical experiences, namely:

6.2.1 the internal rules of the estate agency enterprise (a copy of which internal rules should be inserted into the intern estate agent's PoE);

6.2.2 the procedures for the identification and the verification of the identity of clients (the "know your client" requirements);

6.2.3 information on which client records must be kept as well as how and where that information must be stored and for how long the records must be retained;

6.2.4 the steps to be taken to determine whether or not a transaction is reportable to the Financial Intelligence Centre including the identification of suspicious transactions;

6.2.5 an awareness of the cash threshold requirements;

6.2.6 Financial Intelligence Centre reporting processes and procedures; and

6.2.7 a knowledge of the documents required by financial institutions for the purposes of client verification in terms of the FIC Act.

It is to be emphasised that all principal estate agents **are obliged** to provide continuous training to ensure that all estate agents in the service of the enterprise, as well as other enterprise employees, are fully aware of the requirements of the FIC Act, the regulations and the internal rules and are able to comply fully therewith.

6.3 Taxes

Intern estate agents should, during the course of the internship period, be placed in a position where they are able to acquire, at least, an understanding and practical working knowledge of:

6.3.1 the concept of Capital Gains Tax ("CGT") and its application;

6.3.2 the calculation of Capital Gains Tax; and

6.3.3 a knowledge and understanding of the various taxes payable by individuals, close corporations and companies to the South African Revenue Service.

6.4 General accounting procedures

It is also imperative that intern estate agents should know, understand and be able to apply the general accounting procedures that will generally be applicable in estate agency undertakings. This would, for instance, include:

6.4.1 the receipt of trust moneys, including the acceptance of deposits from consumers;

6.4.2 the banking of trust moneys;

6.4.3 financial reporting and auditing requirements;

6.4.4 being acquainted with the fundamental difference between the trust and business banking accounts of the estate agency enterprise and knowing and understanding the circumstances when each of these accounts will be used by the enterprise; and

6.4.5 the payment of service providers.

Intern estate agents should obtain a copy of all documentation relevant to the general accounting procedures of their specific estate agency enterprise for insertion into their Portfolio of Evidence.

Such documentation would generally include, amongst others:

Costs

- an assessment of the financial position, and affordability, of a prospective purchaser of immovable property in accordance with the requirements contained in the National Credit Act;
- the calculation of bond repayments over different time periods and at different interest rates so as to be able to advise prospective purchasers accordingly;
- the calculation of the various costs that will be payable by a purchaser upon the acquisition of immovable property.

Written confirmations that the intern estate agent has:

- informed the prospective purchaser of the different financing options that are available from different financial institutions;
- explained the qualifying criteria for the grant by financial institutions of mortgage

loans;

- explained the on-going costs that will be incurred by a purchaser of an immovable property arising from the ownership of that immovable property;
- explained the costs that will necessarily be incurred by a tenant when leasing a property
- explained the transfer and bond registration processes to the purchaser of an immovable property

The application of the FIC Act

The intern estate agents should place the following documents into the relevant PoE:

- a copy of the internal rules of the estate agency enterprise; and
- a copy of all templates used by the estate agency enterprise for the purposes of identifying and verifying clients.

7. The marketing and/or selling and/or leasing immovable property

It is essential that the intern estate agent be fully and extensively exposed to, and actively involved in, the marketing processes of the estate agency enterprise by the principal. The intern estate agent should always be afforded the opportunity to accompany the principal and/or any other full status estate agents in the service of the estate agency enterprise when executing estate agency services so as to be able to observe at first-hand how the marketing and/or selling and/or leasing processes are actually accomplished in accordance with relevant company policies and procedures.

The principal and/or any other full status estate agents in the service of the estate agency enterprise are encouraged to create on-the-job simulation opportunities, case studies, role plays and also to use any other similar techniques for the education and professional development of the intern estate agent to ensure that the intern estate agent is properly trained and suitably skilled to interact and work directly with sellers and buyers and/or landlords and tenants and/or other stakeholders using the estate agency services of the enterprise.

The required exposure of the intern estate agent the marketing processes of the estate agency enterprise would generally, amongst others, include:

7.1 Sourcing properties to sell

The intern estate agent will usually be expected to engage in the sourcing of sales mandates, or mandates for the rendering of any other estate agency services, for the estate agency enterprise. It is, therefore, essential that the intern estate agent be adequately guided by the principal in acquiring extensive knowledge of the particular property market in which that intern estate agent will be operating.

7.1.1 Canvassing

The sourcing of stock or properties to market for sale, or of mandates to render any of the other estate agency services that might be offered by the estate agency enterprise, is generally referred to by estate agents as 'canvassing'.

The canvassing process involves, amongst others:

- contacting acquaintances, friends, relatives and any other persons known to the intern estate agent to ascertain whether they have, or know of, properties for sale;
- 'cold canvassing' includes such activities as telephoning property owners and door-to-door canvassing;
- preparing letters of introduction;
- preparing brochures and business cards;
- leaving relevant brochures and business cards in the post boxes of the targeted area; and
- personally visiting potential sellers or renters of immovable property.

Canvassing can be also be personalised by the intern estate agent by way of:

- regular postal drops advertising properties in the area being marketed by the estate agency enterprise;
- the distribution of consumer friendly, but accurate, newsletters on the state of the property market in the area;
- promotions in the local news media;
- the use of personalised brochures and stationery;
- the sponsorship of local events;
- the use of the social media on the internet; and
- involvement in the community and making a contribution to the development of the community.

With a view to obtaining new listings the intern estate agent should, with the on-going assistance and support of the principal, compile a suitable plan of action.

The plan of action should indicate:

- the aim/objective of the plan such as, for instance, how many listings will be required to earn a specified income per month;
- the specification of a particular geographical area for operations (also referred to as a farming area) including a map of that area;
- a time-frame for the implementation of the plan;
- a summary of selling trends in the area such as, for example, the selling price to listing price ratios and the volume of sales expressed in both units and value;
- a summary of possible target market buyers as well as their price range;
- an indication of future developments in the area; and
- the current market share held by competitors.

7.1.2 Working as part of a team when:

- exhibiting;
- hosting road shows;
- attending promotions;
- giving presentations; etc.

7.1.3 Creating a personal presentation folder

It will often be useful for the intern estate agent, with the assistance of the principal, to create a personal presentation folder.

That folder could contain a record of, for example:

- recent sales in the area;
- current property listings;
- expired property listings;
- a copy of a comparative market analysis;
- a proposed effective marketing plan;
- a copy of recent property advertisements, comparative market analyses and other similar marketing brochures;
- a copy of recent letters of recommendation received from satisfied clients;
- a copy of the sales documentation usually used by the estate agency firm;
- a list of relevant property transfers in particular areas in general over the previous six months as well as of property transfers resulting from sales by your enterprise in particular.

7.1.4 Reporting back to the principal on the outcome of the canvassing efforts

7.1.5 Listing properties for sale and/or rental

7.1.6 Qualifying both the seller/landlord and the potential buyer/tenant

It is essential that the intern estate agent become actively involved in the process of qualifying both the seller as well as the potential buyer of an immovable property.

The seller

Insofar as the seller is concerned it is, briefly, necessary that the intern estate agent be aware of the need:

- thoroughly to inspect the property;
- compile a comparative market analysis ("CMA") of the property;
- accurately ascertain who the owner of the property is;
- obtain a mandate (preferably a sole mandate) for the marketing of the property; and,
- list the property for sale.

To undertake the required comparative market analysis the intern estate agent must, with the assistance of the principal, acquire an extensive background knowledge of the South African property market in general and the particular province, town, area and location in particular. The intern estate agent should also have some knowledge of current international property market trends.

At the local level the intern estate agent must be able to consider the following important factors that will influence the value of the property, namely:

- The utility of a property which will be influenced by the:
  - ✓ physical nature or appearance, accommodation, size, age, condition and distinguishing features of the property;
  - ✓ location or proximity to amenities, view and accessibility; and
  - ✓ the legal use to which the property can be put including a consideration of zoning and registered servitude;.
- the relative scarcity or abundance of property in the area; and
- the demand and/or supply of property in the area, which is influenced by such factors as disposable income; the availability of credit; people moving into or out of the area; taste and preferences of property purchasers.

The potential buyer

Where prospective buyers are concerned it is necessary that the intern estate agent be aware that such buyer could potentially have been sourced in various ways including, for instance:

- after having walked into the office of the estate agency firm to make inquiries;
- after having responded to an advertisement; or
- after having met with the estate agent at a prearranged meeting or at a particular show house.

No matter how the initial introduction took place, the motivation and needs of the prospective buyer must still be determined. The intern estate agent must also ascertain such information as the earliest and latest dates when the prospective buyer can take occupation of the property and how the prospective buyer will finance the purchase of a property. It is useful for a 'buyer's listing form' to be used when qualifying a buyer. The buyer's financial position must be carefully analysed and a pre-printed form ensures that the intern estate agent will ask all relevant questions including whether:

- the buyer can pay a cash deposit and necessary transfer and bond registration costs; and
- whether a mortgage loan to finance the transaction is required or if the proceeds from the sale of the buyer's present home will suffice for this purpose.

7.2 Advertising

The major objectives of advertising are to inform prospective property buyers and/or the users of estate agency services of the property stock and/or services that are available; persuade prospective buyers to call the estate agency enterprise; and expose consumers to the estate agency enterprise, and the available property stock and/or estate agency services, on a continuous basis.

It is, thus, necessary that the principal ensures that the intern estate agent is able, upon the conclusion of the internship period, to:

- develop a marketing plan;
- develop a buyer's profile;
- advertising immovable property in the media; and
- advertise immovable property using the internet and social media.

7.3 Selling

It is equally necessary that the principal ensures that the intern estate agent is able, upon the conclusion of the internship period, to:

- compile, and implement, effective marketing and advertising plans;
- successfully host show houses;
- qualify potential buyers;
- negotiate effectively with all parties, including sellers and buyers; and
- finalise and close sales of immovable property.

7.4 Providing effective after-sales service to all parties

The provision of effective after-sales service by the intern estate agent will include such matters as:

- completing the relevant documents and checking to ensure that all relevant documentation and sale/lease/management agreements have been correctly and accurately completed;

- fully explaining all material, and any other, contractual conditions to the parties;

- explaining the financial obligations undertaken by each of the parties or, in other words, 'who is paying for what';

- explaining the conveyancing process to the parties; and

- delivering the required documentation to the conveyancer to expedite the transfer of the property sold from the seller to the purchaser.

  Such documentation will generally include:

  - the original sale agreement;

  - a copy of the identification documents of both the seller and the buyer;

  - a copy of all relevant documentation and resolutions where the seller or the buyer is a legal person or a trust;

  - the contact details (such as telephone numbers, facsimile numbers and e-mail addresses) of both the seller and the buyer;

  - if the seller's property is mortgaged comprehensive details of the mortgagee financial institution including the mortgage account number;

- if the buyer will be registering a mortgage bond to finance the purchase of the property, full details of the proposed mortgagee financial institution including information regarding the responsible person dealing with the matter;

- confirmation that the deposit, if any, has been paid in terms of the sale agreement;

- a copy of the marriage certificates of the buyer and seller (if applicable) as well as a copy of any Ante-Nuptial Contracts, where applicable; and

- a clear indication if the transfer is to be linked to any other transfer.

Documentary evidence to be retained by the intern estate agent

The intern estate agent must keep a copy of all the documentary evidence that is generated in and about the marketing and/or selling and/or leasing of immovable property. Such documentation must be placed in the intern's Portfolio of Evidence.

Relevant documentation in this respect might include, for instance:

Lists of:

- all properties actively canvassed;
- all properties actually listed;
- all properties placed on show including the dates, times and addresses of all show houses;
- brochures produced for use at show houses;
- attendance registers maintained at show houses including details of all follow-up resulting from show houses;
- all properties actually sold through the intervention of the intern estate agent.

Written testimonials received confirming that the intern estate agent has:

- discussed the proposed marketing and advertising plan for the property with the seller who is agreeable thereto;
- explained the financial consequences of the sale of the property to the seller;
- explained all the terms and conditions of the sale agreement to both the seller and the purchaser;
- made full disclosure of all material matters relating to the property and falling within the knowledge of the intern estate agent to the potential purchaser;

- explained the financial obligations to be undertaken by the purchaser in purchasing the property from the seller; and
- explained the conveyancing process to both the seller and the purchaser.

A copy of :

- any letters of introduction produced by the intern estate agent for marketing purposes;
- any comparative market analyses that may have been produced by the intern estate agent for use by potential clients;
- any sole mandates obtained by the intern estate agent;
- all listing forms used by the intern estate agent;
- the marketing and advertising plans produced by the intern estate agent for specific properties;
- all advertisements, and other advertising material, placed in the news media, on the internet and in the social media by the intern estate agent; and
- all completed offers to purchase/sale agreements/lease agreements/management agreements concluded through the intern estate agent.

The principal must confirm, and authenticate, the documentary evidence placed in the PoE by the intern estate agent.

8. **Estate agency management**

It is desirable that the principal also introduce the intern estate agent to such essential functions as, for instance, the systematic approach to achieving objectives, motivation of self and others, becoming an integral part of a successful team, team building and the management and administration of estate agency records.

This function would essentially include such aspects as:

- adopting a systematic approach to the achievement of objectives:
- following standard operating procedures;
- motivating and building successful teams
- managing administration records which entails, among others:
  - controlling and dealing with confidential information and documents;
  - controlling and evaluating the ordering and distribution of office supplies;
  - implementing control measures with respect to individuals;
  - securing and retaining documents;

- avoiding compromising stakeholders;
- implementing effective office policies, procedures and strategies;
- installing effective control systems;
- addressing issues of non-conformance and/or non-compliance.

The intern estate agent must retain a copy of all documentation that may be received and which is relevant to the management function of the estate agency enterprise. Such documents should be placed in the intern's Portfolio of Evidence.

Duty of the principal to mentor the intern estate agent

The principal must grant the intern estate agent the opportunity to observe, and actively participate in, all the management processes and procedures that have been introduced and implemented by the estate agency enterprise. The principal may, in discharging this obligation, also devise realistic management simulation opportunities, case studies and role plays for the education and professional development of the intern estate agent where the management function of the enterprise is concerned.

9. Estate agency administration

It is also desirable that the intern estate agent should, during the course of the internship period, gain a working knowledge and understanding of the administration systems that are utilised by the estate agency undertaking.

The intern estate agent should, therefore, be mentored by the principal insofar as, at least, the following elements are concerned, namely:

- the approved policies and procedures adopted by the estate agency enterprise when dealing with confidential information and documentation;
- the approved administrative systems utilised by the estate agency undertaking;
- the filling system used by the estate agency enterprise with special reference to the maintenance of files and records as well as their retrieval.

A thorough knowledge and understanding of the information and personnel administration systems that are used by the estate agency enterprise will also be of crucial importance to the intern estate agent, especially in the future career pathing of

that person. While respecting the confidentiality of certain information, the intern estate agent should, therefore, be apprised by the principal of:

- current personnel information and payroll systems used by the estate agency enterprise;
- methods implemented by the estate agency enterprise to ensure that all records are properly maintained and are kept up to date;
- checking and capturing mandatory information concerning new appointees, terminations of service, transfers and promotions on the payroll system;
- accurately capturing overtime payments, commissions due to estate agents and other ad-hoc staff expenditure;
- recording all commissions paid to estate agents and/or other interested parties;
- checking, capturing and maintaining necessary timesheets, log sheets and so forth.
- Maintaining personnel information for leave records implies that the intern estate agent must also acquire knowledge of the leave policy of the estate agency enterprise, be able to scrutinise applications for leave, check actual leave days that have been taken and ensure that leave forms are properly authorised in accordance with approved policies. The intern estate agent should, in addition, be able to check and report to the principal on accrued leave for full-time staff as well as for independent contractors in the service of the enterprise, if applicable.
- The intern estate agent must ensure that accurate records are kept, where applicable, in respect of compensation for occupational injuries and diseases and liaise with the payroll department regarding the completion of relevant and/or required documentation.
- The intern estate agent must be granted the necessary access to the filling system of the enterprise and be taught to ensure that proper records in respect of current and former employees and independent contractors are kept and that all necessary documentation has been correctly filed.
- The intern estate agent should be intimately involved in the development, implementation and maintenance of an appropriate policy database as well as on-line systems pertaining to the maintenance of registers and records dealing with such aspects as:

- ✓ the number of telephone calls generated by classified and display advertisements;
- ✓ the number of showings required for each concluded sale/lease/management agreement;
- ✓ advertising costs as a percentage of commissions earned;
- ✓ training costs in relation to estate agency services undertaken;
- ✓ the number of telephone and other contacts needed to obtain each mandate listed; and
- ✓ the number of mandates required for the making of each separate sale.

- The intern estate agent should furthermore be informed of the processes underlying the collating of information; the monitoring, consolidation, processing and presenting of functional information; and the checking and validation of personnel administration and information and records and the completion and submission of personnel source documents for the purpose of processing, compiling and submitting monthly staff schedules.

The business systems of the estate agency enterprise

The intern estate agent must be trained by the principal in the use and understanding of the business systems used by the estate agency enterprise.

Such business systems will generally comprise, amongst others:

- finance systems in respect of, especially, the receipt and banking of trust moneys and financial reporting;
- the accounting system relating, more especially, to such aspects as inventory control, cost controls and budgeting;
- the purchasing system in respect of ordering, buying, expediting orders and the payment of creditors;
- the sales systems in respect of the implementation of procedures, systems and controls related to the receiving, updating and recording of all transactional information;
- the systems in respect of the maintenance of registers and records include the identification and verification records required by the FIC Act;
- systems pertaining to the approval of requisition orders and travel arrangements and the control of claims against the estate agency enterprise;
- systems in respect of the processing, calculation and/or preparation of payments to service providers including the resolution of queries, cost allocations and transfers;

- systems necessary for the maintenance of information on the accounts database and to assist in the preparation of the main and departmental budgets;
- systems for the monitoring and review of operational expenditure to identify and investigate material variances against budget and any other non-conforming outcomes;
- systems necessary to provide consolidated financial and administrative information to the owners and/or management of the estate agency enterprise including inventory analysis and control, forecasts, cash flow analysis, expenditure schedules and estimates and relevant cost indicators pertaining to key support activities for accurate budgeting and strategic and operational planning;
- audit processes to validate transactional recordings; and
- systems and procedures for the cost-effective ordering and distribution of office supplies as well as the control thereof.

The intern estate agent must retain a copy of all documentation that may be received and which is relevant to the business systems of the estate agency enterprise. Such documents should be placed in the intern's Portfolio of Evidence.

10. **The paralegal environment and the intern estate agent**

At the expiry of the internship period, under the mentorship of the principal, the intern estate agent should be confident, competent and able to:

- undertake research, whether legal, economic or financial, utilising all the resources, including electronic resources, available to the estate agency enterprise and to produce clear, concise, accurate and meaningful reports resulting from such research projects;
- finalise and complete all standard documentation used by the estate agency enterprise with the necessary degree of care, aptitude and skill to ensure that such documentation not only accurately reflects the intention of the parties but is also legally valid and binding;
- liaise with auditors, attorneys, conveyancers and other professionals in the performance of the estate agency functions and duties of the enterprise;
- assist full status estate agents in the service of the estate agency enterprise in the discharge of their various estate agency functions and duties in a competent and value-adding manner;

- investigate, and report on, any matters that may be assigned by the principal with a view, especially, to authenticating or validating information received by the estate agency undertaking; and
- effectively and efficiently perform all essential office and administrative functions and duties such as, for instance, the filing of documentation, the maintenance of records, answering telephone calls, taking messages, meeting with clients, dealing with correspondence, etc.

The principal must also ensure that the intern estate agent is able to provide meaningful and correct information to stakeholders concerning such matters as, for instance:

- sale, lease and management transactions;
- anti-money laundering legislation;
- financing options for the purchase of immovable property;
- prevailing economic and socio-political conditions and their impact on the property market;
- forecasts of future conditions; and so forth.

The intern estate agent must retain a copy of all documentation that may be received and which is relevant to the paralegal aspects of the estate agency enterprise. Such documents should be placed in the intern's Portfolio of Evidence.

Certification by the principal at the end of the internship period

The principal is required, at the conclusion of the internship period, to certify and confirm that the intern estate agent:

- **is, in the considered view of the principal, competent and able to serve as a non-principal estate agent; and**
- **has duly performed the various functions and duties of an estate agent as more fully reflected in this logbook.**

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Some suggested projects to be undertaken by the intern estate agent

Project 1: Product knowledge

It is essential that all estate agents know their products, brand and service.

The intern estate agent is required, therefore, to prepare a PowerPoint presentation in respect of any specific estate agency product/service provided by the estate agency enterprise and in respect of which the intern estate agent has already been inducted and has sufficient knowledge.

The presentation should include:

- The features, benefits and advantages which the enterprise is able to offer to consumers.
- The nature of the after-sales service that is provided by the enterprise.
- A comparison of the performance of the enterprise against the performance of similar, competing estate agency firms.
- The distinctive ways in which the interests of clients are served and promoted by the enterprise.
- Some success stories and testimonials of satisfied clients.

The layout of the presentation

The layout of the presentation should include:

- A title slide.
- An introduction.
- A conclusion.
- Contact details of the estate agency enterprise.
- Photographs of some of the properties successfully marketed for sale by the enterprise.
- The logo and slogan of the enterprise.

At the conclusion of the presentation

- The presentation should not exceed ten minutes in length.
- Provide for a 'Questions and Answers' session after the conclusion of the presentation.
- Prepare answers to any possible questions that might be asked by members of the audience.

The audience

The intern estate agent should give the presentation to, at least, the principal and any other members of the estate agency enterprise who are willing to be involved. Such persons should be requested to provide feedback on the presentation.

The intern estate agent should place a disk recording the presentation, as well as a printed version of the presentation, together with any written feedback received, in the Portfolio of Evidence.

Project 2: Develop a business plan

It is essential that the intern estate agent be able to develop an acceptable business plan.

The business plan should contain, at least, the following elements:

- An Executive Summary dealing with:
  - ✓ The background to the business idea;
  - ✓ The predicted profitability and growth potential; and
  - ✓ Business goals
- The vision and mission.
- A marketing plan.
- An operations plan.
- An organisation and management plan.
- A financial plan.

Activities to be undertaken by the intern estate agent before compiling the business plan include:

Research the different environments affecting the real estate sector

The required research by the intern estate agent would include:

- current and predicted future demographic trends which may affect the estate agency undertaking;
- the prevailing, and predicted future, economic environment and especially:
  - ✓ socio-economic factors that affect the real estate environment
  - ✓ The political environment; and

  - ✓ The technological environment;
- legislation affecting the real estate environment.
- performing a competitor analysis concentrating on:
  - ✓ the identification of existing competitors;
  - ✓ an estimation of their market share;
  - ✓ an identification of other direct and indirect competitors; and
  - ✓ a measurement of the strengths and weaknesses of the identified competitors

The marketing strategy

The next step for the intern estate agent is to develop a marketing strategy by developing and organisational and management plan as well as a financial plan.

- The organisational and management plan will include an organogram of the enterprise; the salary structure and legal and industry compliance.

- The development of a financial plan will include a balance sheet; income statement; cash flow statement and break-even analysis.

The intern estate agent should place the written business plan that has been developed, together with the written results of all the research necessarily undertaken for the development of the plan, into the Portfolio of Evidence.

Project 3: Develop a marketing plan for a specific property

It is essential that the intern estate agent, no matter which sphere of estate agency that intern operates or intends to operate in, is able to develop a marketing plan in respect of a specific property. The marketing plan for a specific property should include an advertisement for the property prepared by the intern estate agent. The advertisement should, furthermore, be accompanied by a clear, and attention generating, photograph of the property.

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The intern estate agent must request the principal to evaluate the advertisement that has been prepared by completing the table below. Once approved by the principal, the advertisement should be placed in the intern's Portfolio of Evidence.

	The advertisement	**Yes**	**No**
1.	Is the advertisement accompanied by as clear and relevant photograph that enhances the advertisement?		
2.	Does the advertisement include the theme, design, price and location of the specific property?		
3.	Does the message portrayed by the advertisement attract attention and speak to the target market?		
4.	Does the layout of the advertisement contribute to attracting the attention of the target audience?		
5.	Does the advertisement includes all the necessary contact details of the estate agency undertaking?		

I confirm that, to the best of my knowledge, the intern estate agent designed the marketing plan and advertisement by him/herself.	**Yes**	**No**
I believe the intern estate agent has demonstrated competence in developing a marketing plan and in advertising a specific property.		

_____ **Date:** _____

Principal

Project 4: Compile an individual development plan

The individual development plan which must be compiled by the intern estate agent should enable the intern estate agent to:

- establish own goals and objectives within the real estate profession;
- encourage career pathing and advancement;
- compile an action plan to assist in achieving desired goals and objectives;
- facilitate the achievement of the established goals and objectives; and
- enhance work productivity and career profitability to the mutual benefit of both the intern estate agent and the estate agency enterprise.

The individual development plan of the intern estate agent should, therefore, include:

- a full job description;
- an analysis of key performance indicators;
- a comprehensive analysis of the proven skills, abilities and competencies of the intern estate agent including the personality type and personal values of the intern estate agent;
- a considered review of the potential threat of changes to, for instance, the current real estate legislation and/or the volatile socio-politico-economic environment within which estate agents operate;
- an examination of the opportunities that are available to the intern estate agent to further enhance skills and competencies;
- a comprehensive listing of the intern estate agent's target goals, plans for future development and the timeframes for the achievement of those plans and objectives.

The intern estate agent should now be in a position to draft the individual development plan accordingly.

The intern estate agent should place the individual development plan that has been drafted into the Portfolio of Evidence.

Project 5: Draft an activities schedule

The intern estate agent is required to draft an activities schedule to facilitate the management of day-to-day functional activities. To ensure the validity of the activities schedule it is desirable that the intern estate agent maintain a time-log for at least one week prior to the drafting thereof. Such a time-log should enable any problem areas in the scheduling of activities to be identified.

From the information gained from the time-log that has been kept the intern estate agent will be in a better position to plan how to:

- address and deal with the more time-consuming activities;
- accommodate deadlines;
- prioritise functions and tasks; and
- establish achievable goals.

The intern estate agent should place the activities schedule that has been drafted into the Portfolio of Evidence.

Project 6: Analyse the policies and procedures of the estate agency undertaking

The intern estate agent should undertake a comprehensive analysis of the policies and procedures of the estate agency undertaking to establish legislative compliance with, in particular, the Estate Agency Affairs Act and the Financial Intelligence Centre Act. Should any areas of material non-compliance be detected, the intern estate agent should draft a memorandum to the principal on the necessary steps to be instituted by the estate agency enterprise company to become compliant. The memorandum should specifically address the requirements of the Financial Intelligence Centre Act for 'accountable institutions' as well as the consequences of con-compliance with the provisions of that Act.

The intern estate agent should place the analysis of the policies and procedures of the estate agency undertaking that has been drafted into the Portfolio of Evidence.

Project 7: Proposal on enhancing the performance of a team

The intern estate agent is required, after due observation and study, to draft a proposal to the principal on how to further enhance the performance of teams. The proposal should include a plan of action designed to accomplish the objective of enhancing the performance of teams.

During the research phase the intern estate agent should be mindful of, and address:

- conflicts that may arise in teams;
- situations that could impede the efficiency and effectiveness of teams;
- the strengths and weaknesses of group/team participation;
- the strengths and weaknesses of the individuals making up teams;
- situations that might arise in a team situation which can lead to unease and/or dissent and/or frustration and/or dissatisfaction amongst team members;
- positive situations that can result from working in a team;
- the motivation levels, or lack thereof, in teams; and
- the management style of team leaders and how this can positively or negatively impact the working and functionality of the team.

The proposal should, furthermore, address the following issues, namely:

- strategies for effectively dealing with issues that may arise in the team;
- strategies for creating a positive team working environment;
- support systems for teams;
- strategies to maximise the strengths of the individuals comprising the team;
- strategies to minimise negative situations that could seriously impact the functioning of the team; and
- techniques to motivate team members and the team as a whole including, for instance, communication, the recognition of achievements, listening, involvement of team members in decision-making and the measuring of team performance and feedback on team performance.

The intern estate agent should place the proposal on enhancing the performance of a team that has been drafted into the Portfolio of Evidence.

Project 8: Prepare a presentation on differing financing options

The intern estate agent is required to prepare a presentation in which the financing options available to a potential seller, buyer, lessor and lessee are explained.

In preparing for the presentation the intern estate agent should:

- carefully research the different financing options that are offered by each of the various financial institutions;
- design a checklist of the information that the banks would generally require of a purchaser as well as the obligations imposed on financial institutions by the National Credit Act in providing mortgage financing;
- provide an explanation of what a mortgage bond entails including the types of immovable property that are classified as good security, properties that are classified as risks and are, accordingly, not accepted as constituting good security, lenders that might pose a risk to the financial institution and the circumstances when collateral security is required;
- deal with the costs that will be incurred by sellers, purchasers, lessors and lessees; and
- provide actual examples of the calculation of mortgage bond repayments.

The intern estate agent should place the presentation on differing finance options that has been drafted into the Portfolio of Evidence.

Project 9: Design a brochure on the registration of title deeds and mortgage bonds in the deeds office

The intern estate agent is required to design an information brochure for the use of potential immovable property sellers and buyers on the deeds office processes for the registration of title deeds and mortgage bonds providing a user friendly process flow chart and indicating the timelines for the various processes. The brochure should, in addition, explain the nature of the various parties involved in the registration processes, including the deeds office, clearly indicating their roles and functions. The costs that will be incurred and the importance of timing should also be stressed

The intern estate agent should place a copy of the brochure that has been designed into the Portfolio of Evidence.

Project 10: Research project

The intern estate agent is required to obtain a copy of the Code of Conduct for Estate Agents for the purposes of the research project.

After a careful study of the Code of Conduct for Estate Agents the intern estate agent must prepare a comprehensive research report on the contents of the Code of Conduct for Estate Agents with special reference to the different ethical duties and obligations that are placed on estate agents as well as the consequences of non-compliance with the provisions of the Code of Conduct for Estate Agents.

The intern estate agent should place a copy of the Code of Conduct for Estate Agents as well as the research report that has been prepared into the Portfolio of Evidence.

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INTERN ESTATE AGENT

WORKPLACE LEARNING LOGBOOK

Educational background: (In date order - from the oldest to the latest)

Qualifications achieved	Provider name	Year qualified

Work experience
(List previous occupations/jobs from the most recent to the oldest)

Organisation	Department	Job title	Years

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Intern estate agent: curriculum vitae

The curriculum vitae contained in this logbook should be up-to-date and must include references with contact details.

(Insert curriculum vitae after this page)

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Identity document

The copy of the identity document of the intern estate agent included in this logbook must be duly certified by a Commissioner of Oaths.

(Insert ID documents after this page)

Intern estate agent: Job description

(Insert current job description)

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Intern estate agent: Fidelity fund certificate

Insert a copy of the current 'intern' fidelity fund certificate held by the intern estate agent - as well as, where appropriate: • **a copy of any amended 'intern' fidelity fund certificates that might, during the course of the internship period, be issued to the intern estate agent by the EAAB after a change of principals by the intern estate agent; and** • **a copy of the letters from both the previous principal and the new principal advising the EAAB of such change.**

Certified copy of relevant certificates/qualifications

Insert a certified copy of relevant certificates/qualifications such as the Senior Certificate and any other certificates including diplomas and/or degrees from tertiary institutions as well as professional qualifications.

(Insert a certified copy of all relevant educational certificates and qualifications after this page.)

List of educational certificates/qualifications included in the logbook

Declaration of authenticity of logbook – intern estate agent

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OF SOUTH AFRICA

[To be completed by the intern estate agent at the termination of the internship period prior to the logbook being furnished to the EAAB for assessment purposes.

Should the intern have changed principals during the course of the internship period the declaration of authenticity must be completed by the intern estate agent each time such intern changes principals and, again, upon completion of the internship period]

I, **……..,** the undersigned, do hereby declare that all the information and material contained in this logbook has been produced by myself in and about my functions and duties as an intern estate agent holding an 'intern' fidelity fund certificate.

I acknowledge that I am obliged to keep all workplace evidence and records up-to-date.

Signed at **……** (place) on **…….....**(day)**……..**(month)20**…. .** (year)

Intern details:

Name **:……**

ID**:……..**

Signature:**……**

ESTATE AGENCY AFFAIRS BOARD
OF SOUTH AFRICA

Declaration of authenticity of logbook - principal

[To be completed by the principal at the termination of the internship period prior to the logbook being furnished to the EAAB for assessment purposes.

Should the intern have changed principals during the course of the internship period the declaration of authenticity must be completed by the previous principal each time such intern changes principals and, again, by the current principal at the time when the internship period is completed]

I,**……,** the undersigned, do hereby declare that I, in my capacity as a principal estate agent, have actively mentored the intern estate agent in the functions and duties of a professional estate agent and that, to the best of my knowledge and belief, this logbook is a true and accurate reflection of the activities completed by the intern estate agent at the workplace.

Signed at …… (place) on ……(day)……..(month),20…… (year)

Principal details:

Name:**……**

ID:**……..**

Signature:……..

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Induction

I ……(name and surname of intern estate agent) include the following evidence:

Signature of intern estate agent: _____Date:_____.

Signature of principal: _____ Date: _____

(Insert all evidence <u>generated during the induction process</u> after this page.)

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Induction

Date:_____

Principal: _____

I was inducted on the following:	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Intern estate agent signature: _____Date:_____.

Facilitator signature:_____.

*You may make copies from this form

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I have learned the following skills:

*You may make copies of this form

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Performance appraisals

I include a copy of the following performance appraisals:	Date of appraisal

Intern estate agent Signature:_____Date:_____ .

Principal signature: _____ .

*You may make copies of this form

(Insert all evidence generated after this page)

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I was trained on the following

I include the following evidence:

Intern estate agent signature: _____ Date:_____ .

Principal signature:_____.

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date: _____

Facilitator: _____

I was trained on the following :	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Intern estate agent signature:_____ Date:_____ .

Facilitator signature:_____.

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I have learned the following:

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Product training

I …… (name and surname of the intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

*You may make copies of this form

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Legal environment

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

*You may make copies of this form

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Financial environment

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following:

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The marketing and/or selling and/or leasing of property

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

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Management environment

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

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Administration environment

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

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Paralegal environment

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

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Human resource environment

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following skills:

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Compliance with the Estate Agency Affairs Act and the Financial Intelligence Centre Act and other legislative requirements

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following:

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Compliance with the Code of Conduct for Estate Agents

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following:

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Marketing generally

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following:

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Other workplace activities

I …… (name and surname of intern estate agent) include the following evidence:

Intern estate agent signature:_____ Date: _____

Principal signature: _____ Date: _____

(Insert all evidence generated after this page.)

ESTATE AGENCY AFFAIRS BOARD
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Task breakdown

Date	Description of tasks	My responsibilities	Hours/days/weeks actually worked

*You may make copies of this form

Principal signature: _____ Date:_____

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I have learned the following:

*You may make copies of this form

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Confidential questionnaire to be completed by the intern estate agent prior to submitting the final logbook to the Estate Agency Affairs Board for assessment

My perception of the internship programme

This questionnaire is **strictly confidential**.

Responses will **not** be disclosed or discussed by the Estate Agency Affairs Board, or its employees, with your employer, your principal or any other persons, bodies or organisations.

Please tick the option box which best describes the answer to the questions asked.

1. How much was your estate agency knowledge-base broadened through the interactions of your principal(s)/mentor(s)?	Very much	
	Much	
	Moderate	
	Little	
	Very Little	
2.How much was your estate agency knowledge-base broadened through the interactions with your workplace colleagues and/or team(s)?	Very much	
	Much	
	Moderate	
	Little	
	Very Little	
3.How would you personally rate your contribution to the performance of your colleagues and/or the team(s) with which you worked and/or interacted during the internship period?	Very much	
	Much	
	Moderate	
	Little	
	Very Little	
4.Did the internship programme generally meet with your expectations?	Very much	
	Much	
	Moderate	
	Little	
	Very Little	
5.Did any of the courses covered by any of your previous qualification(s), if relevant, prepare you for the estate agency workplace?	Very much	
	Much	
	Moderate	
	Little	
	Very little	
6.Were the tasks given to you during the internship period	Always	

relevant to your professional growth as an estate agent?	Usually	
	Seldom	
	Never	
7.How would you generally rate the internship programme?	Excellent	
	Very Good	
	Good	
	Poor	
8. Did you enjoy the work and functions that you were required to perform as an intern estate agent?	Always	
	Usually	
	Seldom	
	Never	
9. Did your principal/mentor always brief you sufficiently before giving you a new task to perform?	Always	
	Usually	
	Seldom	
	Never	
11. Did you always understand the nature of the tasks/functions that you were required to perform?	Always	
	Usually	
	Seldom	
	Never	
12. Did you find that performing estate agency work stimulated your creative ability?	Always	
	Usually	
	Seldom	
	Never	
13. Did the tasks/functions that you were required to perform as an intern estate agent offer you an opportunity for clear and independent thinking?	Always	
	Usually	
	Seldom	
	Never	
14. Was there a clear link between the theory that you were required to study to attain your real estate qualification and the tasks/functions that you performed at the workplace?	Always	
	Usually	
	Seldom	
	Never	
15. Were the tasks/functions delegated or allocated to you at the workplace manageable?	Always	
	Usually	
	Seldom	
	Never	

16. Which of the following generic skills, if any, do you think you acquired during the course of the internship programme? [Please tick the appropriate response box(es)]	I developed effective communication skills relevant to the workplace.		
	I was able to give, and to follow, simple as well as more complex instructions.		
	I frequently made use of practical planning and problem-solving techniques.		
	I believe I demonstrated an acceptable code of conduct within the work environment.		
	I was able to employ effective writing skills and strategies when writing both simple and more complex work-related letters and documents.		
	I actively participated in small and larger informal groups.		
	I noted that the fair and equal treatment of all persons was respected in the workplace.		
	I interacted with clients/stakeholders both within and external to the organisation by, for instance, using the telephone and other electronic means of communication as well as through face-to-face interactions.		
17. Would you prefer to remain permanently in the service of the estate agency enterprise where you did your internship if offered the opportunity?		Yes	
		No	
18. Would you recommend the profession of estate agent, as a career of choice, to others?		Yes	
		No	

ESTATE AGENCY AFFAIRS BOARD
OF SOUTH AFRICA

Any additional comments that you would like to make:
